

# Launching a Messaging Campaign



Help Center Manager

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**Intro:** This workflow guide covers how to create and launch a Messaging Campaign. Messaging Campaigns allow your institution to email or text 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 messages (SMS or email) in the campaign.

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## Messaging Campaigns and Navigate360

Messaging Campaigns are a useful part of Navigate360 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 a Messaging Campaign

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

## Messaging Campaigns

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

[+ Add New](#)

## Define the Campaign

The **New Messaging Campaign** page opens. Set the criteria for the Messaging Campaign. The fields that must be filled out are listed and defined below.

### New Messaging Campaign

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

#### Define Campaign

Set up your campaign.

#### Campaign Information

\* Campaign Name

Tracking URL [?](#)

Tracking URL Display Value [?](#)

#### Timeline

- Campaign Name Pending Setup...
- Recipients Pending Setup...
- Welcome Message 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 so it's easy to identify the purpose and to avoid title duplication.

### Tracking URL

The URL you want students to click. This will show in an SMS nudge.

## Tracking URL Display Value

The text students will see in an 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 Recipients To Campaign

Unsaved Student Search Save

Modify Search

Actions ▾

	<input type="checkbox"/>	NAME	ID
1.	<input type="checkbox"/>	<a href="#">Aadland, Derrick</a>	29514708
2.	<input type="checkbox"/>	<a href="#">Aadland, Theodore</a>	52803174
3.	<input type="checkbox"/>	<a href="#">Aaron, Kimberly</a>	74905316
4.	<input type="checkbox"/>	<a href="#">Aasen, Vivian</a>	98140532
5.	<input type="checkbox"/>	<a href="#">Abbott, Donna</a>	57439028
6.	<input type="checkbox"/>	<a href="#">Abbott, Donnie</a>	53821496
7.	<input type="checkbox"/>	<a href="#">Abbott, Melvin</a>	60834517
8.	<input type="checkbox"/>	<a href="#">Abbott, Nancy</a>	13587094

Previous

1
2
3
4
5
...
130
Next

12993 total results

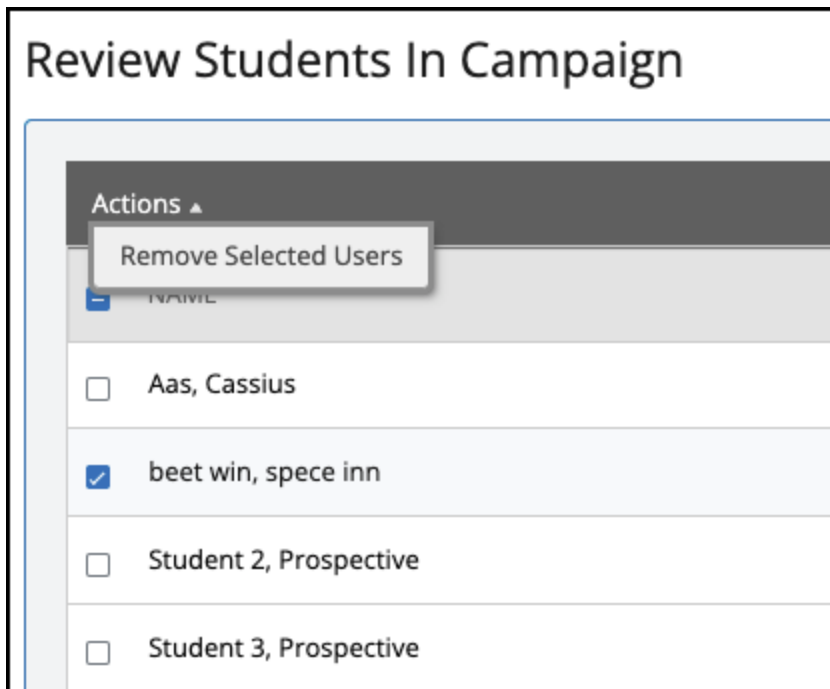
#### Timeline

- 🚩 **Name: RSVP to Club Day**
- 👤 **Recipients**  
Pending Setup...
- ✉️ **Welcome Message**  
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.



Once finished, click **Continue**.

## Add Welcome Message and Nudges

**Note.** Welcome messages are the first nudge sent to students.

Nudges allow for more communication from your school to students during a Messaging Campaign. Each nudge is an email or SMS sent to your campaign list. Welcome messages send immediately after starting the campaign. Other nudge message are sent the morning of the date chosen when you create the nudge. Some may be slightly delayed. as with any large transmission.

To create the welcome message and other nudges, define your campaign and create your list of students for the Messaging Campaign. The Nudges page opens.

## Messaging Campaign: Register to vote


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

### Compose Nudges




#### Nudges

Add a nudge to send to the students you have selected on specific dates. You can have as many nudges as you would like.

[+ Add Welcome Message](#)

 There are currently no nudges

#### Timeline

-  **Name:** Register to vote
-  **Recipients:** 100
-  **Welcome Message:** Pending Setup...

[< Back](#) Save and Exit [Continue >](#)

Click **Add Nudge** to create your first nudge. You can create either an email or SMS nudge. Note that you can only create one nudge of a single type per day. So for example, you can't have a text and an email nudge go out the same day, but you can have a welcome message that's an email the first day, then a text the next day, and so on.

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.

## Messaging Campaign: Register to vote

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

### Nudge Type

Email 
  SMS

### Add Nudge

#### Compose Email

Subject

Message

**B** *I* Heading 2 Merge Tags ↩ ↪

**Get Registered To Vote**

Hi {\$student\_first\_name},

It's important to be registered to vote. The campus Democracy Club, along with the Political Science and American History departments have partnered with the League of Women Voters to invite you to register to vote by opening the custom link below.

{tracking\_hyperlink}

Thank you!

**Available Merge Tags** ⓘ

{student_first_name}	Inserts the student's first name
{student_last_name}	Inserts the student's last name
{tracking_hyperlink}	Inserts the tracking link for this campaign

**Add Attachment:**

No file chosen

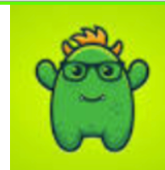
\* Send Date ⓘ

**Previous Nudge Dates:**  
N/A

**Current Nudge Dates:**  
N/A

#### Preview Email

### Register to Vote



### Get Registered To Vote


Hi Andrew,

It's important to be registered to vote. The campus Democracy Club, along with the Political Science and American History departments have partnered with the League of Women Voters to invite you to register to vote by opening the custom link below.

[Register here](#)

Thank you!

**Any Additional Questions?**  
Please contact your assigned Advising Center for additional information regarding this email.



When you select the Email type, the page above appears. Enter a subject line and customize the message. For email messages, you can add an attachment to 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 nudge is sent. The nudge with the earliest date starts your Messaging Campaign. If you set the date for the current day, the nudge will send immediately after starting the campaign. If you set the date for the next day or after, the first nudge sends at 10 AM Central Time of the date set.

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

**Important.** Your Messaging Campaign "ends" when your last message is sent. You can continue to add Nudges after the last message is sent, if this is helpful to your Messaging Campaign.

When you select the SMS nudge type, the Compose SMS page displays.

The screenshot shows two side-by-side panels: "Compose SMS" and "Preview SMS".

**Compose SMS:**

- A text input field labeled "Message" containing "Sample Text Message".
- A section titled "Available Merge Tags" with a help icon. It lists the tag "{\$campaign\_url}" with the description "Inserts tracking link URL set on define page."
- A "Send Date" dropdown menu showing "December 6, 2022".
- Fields for "Previous Nudge Dates:" (N/A) and "Current Nudge Dates:" (12/06/2022).

**Preview SMS:**

- A large empty text area for previewing the message.
- A character count "0 / 160" at the bottom right of the text area.

At the bottom of the interface are two buttons: "Cancel" and "Save Nudge >".

The SMS must be 320 characters or less, and the campaign URL counts toward the limit. You can insert the campaign URL by using the {\$campaign\_url} merge tag. SMS nudges cannot be styled and pictures cannot be added.

Set a Send Date, create your SMS nudge and select **Save Nudge** to add it to your campaign.

## Confirm and Send

Review your campaign details, nudges, and recipients on this page.

# Messaging Campaign: Register to vote

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

## Confirm & Send

### Campaign Summary

**Define Campaign**  
Name: Register to vote  
Tracking URL: <https://www.vote.org>  
Tracking URL Text: Register here

**Sender** Support 22

**Recipients** [View 100 recipients](#)

**Welcome Message**  
Send Date: Tue 12/06/2022  
Subject: Register to Vote  
Email Preview: [View Email](#)

**Scheduled Nudge**  
Send Date: Fri 12/09/2022  
SMS Preview: [View SMS](#)

[Back](#)

Save and Exit

[Start Campaign](#)

Click **Start Campaign** when you are ready to email the invites to the selected students. If your welcome message is the same day as your campaign creation date, the nudge will send almost immediately. If the welcome message is the next day or after, it sends at 10 AM Central on that date.