

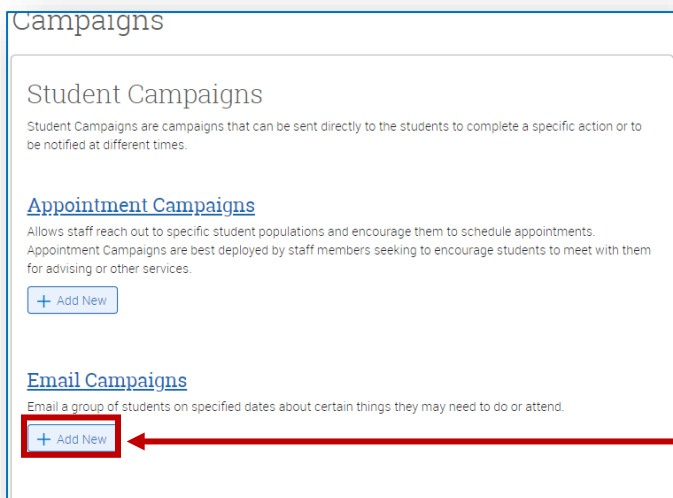
Date: 6/21/2022

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 “Email Campaign” and click on “Add New”



Step 4. Defining the Campaign

Define the Campaign

4a. To define the Email Campaign, fill in the required fields listed below.

Define Campaign

Set up your campaign.

Campaign Information

a. *Campaign Name

b. Tracking URL

c. Tracking URL Display Value

Timeline

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

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. Tracking URL

Optional. Enter the key URL that students will use to take action for this campaign. Include the full URL with **http://** or **https://**. The URL can be used in your nudges.

c. Tracking URL Display Value

This value will display in place of the URL in the email to students (ex. "Click Here to Register")

Step 5. Adding students to the Campaign

Add Students to the Campaign

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

NAVIGATE CAL STATE LA

Email Campaign: Test Email Campaign

Define Campaign Verify Recipients Compose Nudges Confirm & Send

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

Enrollment History Enrollment Terms

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

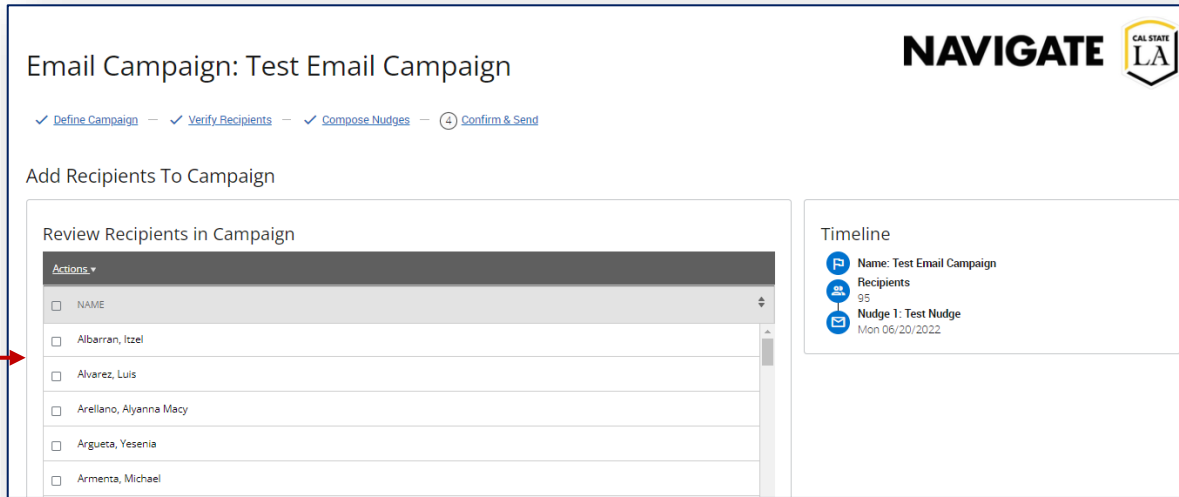
Term Data Classification, Term GPA

Timeline

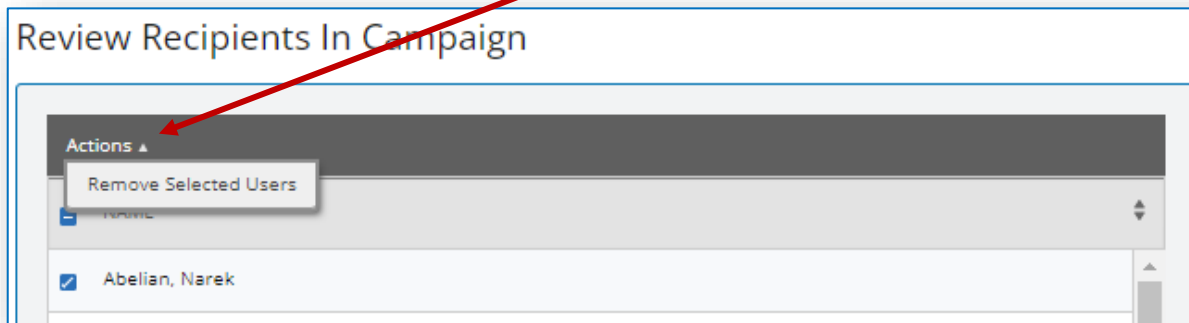
- Name: Test Email Campaign
- Recipients: 95
- Nudge 1: Test Nudge Mon 06/20/2022

5b. In this **Advanced Search**, select additional search criteria to focus on the specific student population targeted for this campaign.

- 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 does not belong in the campaign, select the box next to their name, then from the Actions menu choose "Remove Selected Users".



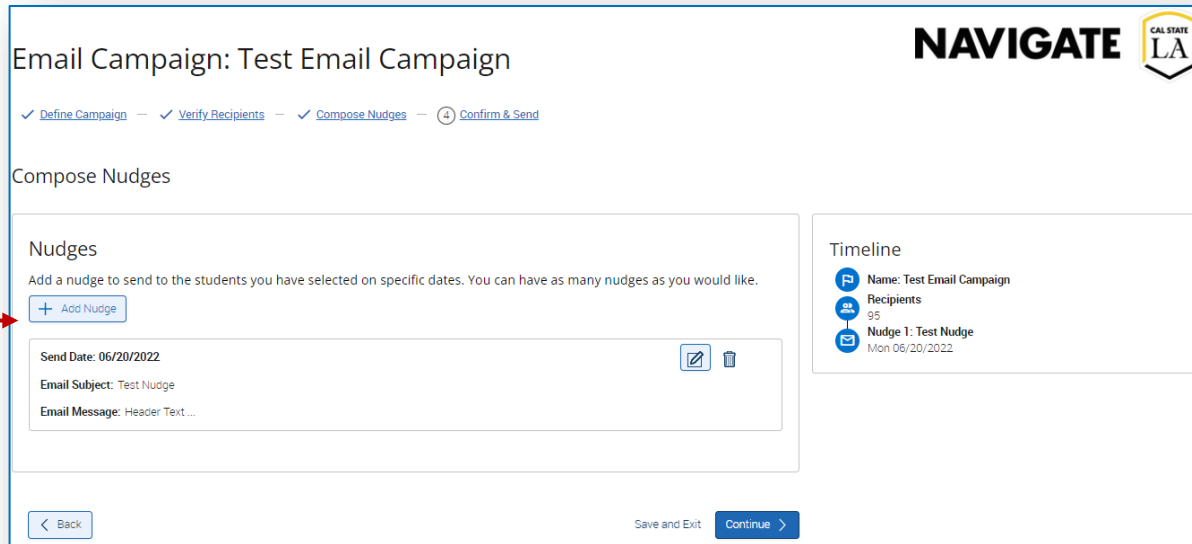
- 5e. Once finished, click Continue.

Step 6. 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 Email Campaign.
- Nudge emails created by the Organizer are sent the morning of the date selected for each nudge.

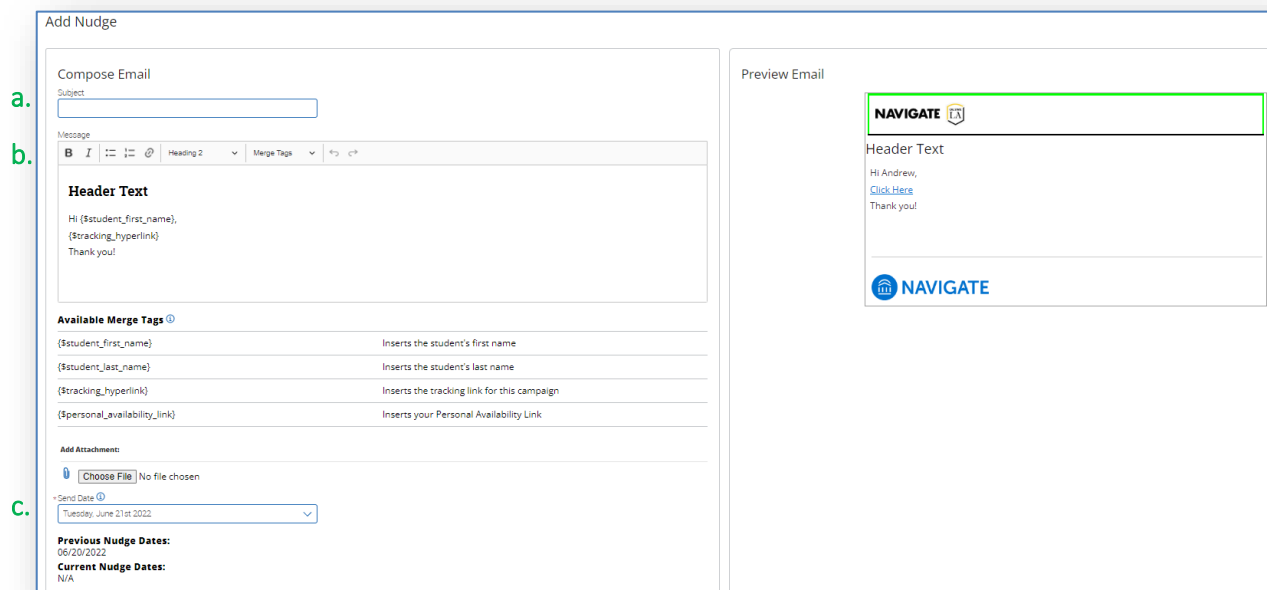
- 6a. Click “Add Nudge” to create your first nudge. You must create at least one initial nudge per campaign; however, you can create additional nudges for the same campaign. There is no limit to the number of nudges that can be created for a specific campaign, but you can only send 1 nudge per day, per campaign.



- 6b. 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:

- a. Email Subject
 - o The subject of the nudge email going to the student.
- b. Message
 - o The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.
- c. Send Date
 - o The date the email nudge is sent. The nudge with the earliest date will essentially start your Email Campaign.



- 6c. After creating a nudge, click **Save Nudge** to continue. You may create additional nudges after this step.

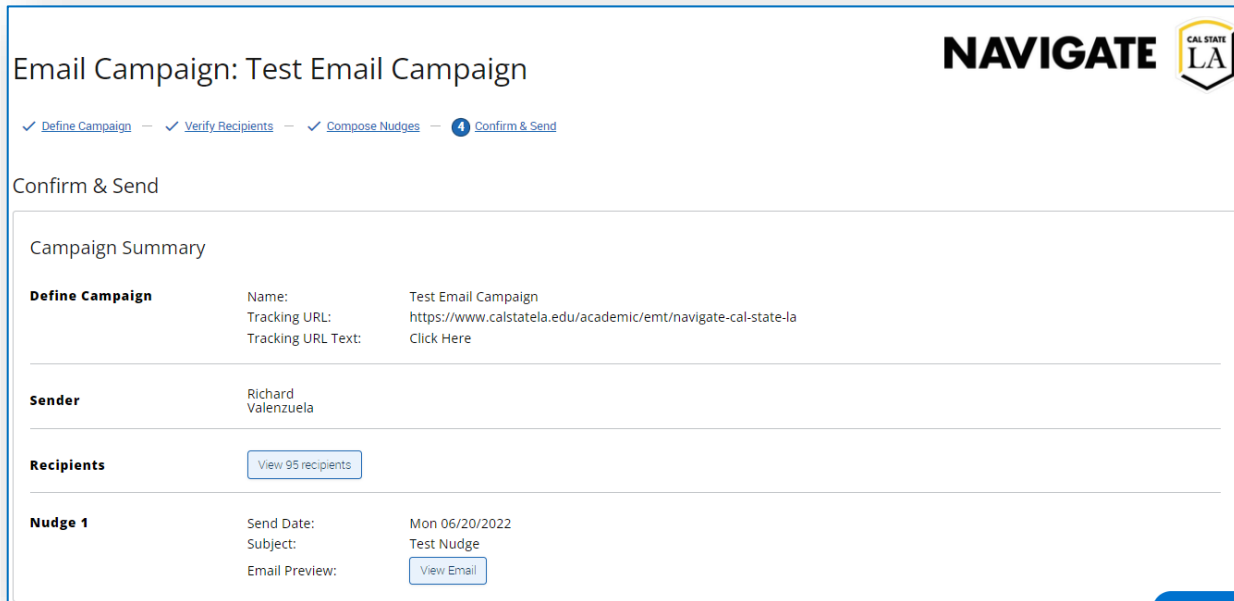
- 6d. After you finish creating Nudges, click Continue to go to the **Confirm & Send** page.

Step 7. Completing the Campaign

Confirm and Send

7a. The last step is the **Confirm and Send** page. Here you can review all elements of your Email Campaign. Once you have confirmed that all is correct, you may send the campaign to your students.

Note: If an error is detected, it will prevent you from sending the campaign and an error message will appear on this page.



The screenshot shows the 'NAVIGATE' interface for an email campaign. The page title is 'Email Campaign: Test Email Campaign'. A progress bar at the top indicates the current step is 'Confirm & Send', with previous steps 'Define Campaign', 'Verify Recipients', and 'Compose Nudges' completed. The main content area is titled 'Confirm & Send' and contains a 'Campaign Summary' section. This section is divided into three parts: 'Define Campaign', 'Sender', and 'Recipients'. 'Define Campaign' lists the name 'Test Email Campaign', tracking URL 'https://www.calstatela.edu/academic/emt/navigate-cal-state-la', and tracking URL text 'Click Here'. 'Sender' lists 'Richard Valenzuela'. 'Recipients' has a 'View 95 recipients' button. Below this is a 'Nudge 1' section with 'Send Date: Mon 06/20/2022', 'Subject: Test Nudge', and an 'Email Preview: View Email' button.

| Campaign Summary | | |
|------------------------|------------------------------------|---|
| Define Campaign | Name: | Test Email Campaign |
| | Tracking URL: | https://www.calstatela.edu/academic/emt/navigate-cal-state-la |
| | Tracking URL Text: | Click Here |
| Sender | Richard Valenzuela | |
| Recipients | View 95 recipients | |
| Nudge 1 | Send Date: | Mon 06/20/2022 |
| | Subject: | Test Nudge |
| | Email Preview: | View Email |

7b. 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.