

# EAB Navigate360: Add/Remove Students from Active Appointment Campaign

## **REMOVING** Students from a Campaign

1. Open the campaign where you want to remove students and select **Edit Campaign Details**.

The screenshot shows the 'Appointment Campaigns' page for a campaign named 'SOE Major Change'. The page displays four key metrics: 'STUDENTS IN CAMPAIGN' (6), 'APPOINTMENTS MADE' (50% with 3 students), 'APPOINTMENTS ATTENDED' (33% with 2 students), and 'SUMMARIES CREATED' (66% with 2 students). On the right, there is an 'Options' menu with links for 'Edit Campaign Details' (highlighted), 'Delete This Campaign', and 'Export Student List'. Below the metrics, there is a 'Nudge Metrics' section and a 'Campaign Information' section.

2. When you reopen your campaign, click the **Verify Recipients** link at the top to view the current list of recipients that have already been invited.

To remove students from the campaign, check the box in front of the student's name and open the **Actions** menu. Choose **Remove Selected Users**, then **Save and Exit** to keep the current campaign settings as is.

The first screenshot shows the 'Edit Appointment Campaign: SOE Major Change' page. It features a progress bar with steps: 'Define Campaign' (checked), 'Verify Recipients' (checked and highlighted), 'Select Staff', 'Compose Nudges', and 'Verify and Start'. Below the progress bar, the 'Define Campaign' section is visible, showing fields for 'Campaign Name' (SOE Major Change) and 'Care Unit' (Advising). The second screenshot shows the 'Review Recipients in Campaign' modal. It has an 'Actions' dropdown menu with 'Remove Selected Users' selected. Below the menu, there is a list of recipients with checkboxes: 'Brisban, Johnson' (checked) and 'Maltez, Brianna' (unchecked).

## ADDING Students to a Campaign

1. Open the campaign where you want to add students and select **Edit Campaign Details**.

Appointment Campaigns > SOE Major Change

05/19/2023 - 01/31/2024

STUDENTS IN CAMPAIGN <b>6</b>	APPOINTMENTS MADE <b>50%</b> 3 Students	APPOINTMENTS ATTENDED <b>33%</b> 2 Students	SUMMARIES CREATED <b>66%</b> 2 Students
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Nudge Metrics

New Student(s) Nudge

Options

- Edit Campaign Details
- Delete This Campaign
- Export Student List

Campaign Information

Care Unit  
Advising

2. When you reopen your campaign, click the **Verify Recipients** link at the top to view the current list of recipients that have already been invited. To add students to the campaign, select **Add More Recipients**, below the list on the left-hand side.

< Back Add More Recipients Save and Exit Continue >

3. The **Advanced Search** space will open, where you add more students. Follow the same method you would use when creating a campaign to add the student(s), followed by reviewing the newly added recipients. Then click **Continue** until you reach the **Verify and Start** page, unless you would like to compose or edit your current nudges.

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 ?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender	Race or Ethnicity	Preferred Name ?	Student List (In Any of These)	
All ▾	All ▾	<input type="text"/>	All <input type="text"/>	
Transfer Student				

Add Recipients To Campaign

Unsaved Student Search [Save](#)

First Name: Rita [x](#) Last Name: Paws [x](#)

[Search](#) [Modify Search](#)

Actions ▾

<input type="checkbox"/>	NAME	ID
1. <input checked="" type="checkbox"/>	<a href="#">Paws, Rita (they/them)</a>	990563905

[Previous](#) [1](#) [Next](#) 1 total results

[Back](#) [Continue](#)

3. If the campaign has already launched, you will see a popup note on the **Confirm & Send** page to use the **Send Nudge Now** button to immediately send the new students a nudge.

**Some newly added students in this campaign have not received a nudge yet** [×](#)

You can send a nudge to them now with the **Send Nudge Now** button below or Save and Exit the campaign without sending these users an initial nudge. **All students that are a part of this campaign will receive future nudge emails.**

[Save and Exit](#)[Send Nudge Now](#)

- Click **Send Nudge Now** to send your first scheduled nudge to the new students in your campaign. Another popup window will open with the first nudge's content, pre-populated. Adjust the nudge message for newly added students if necessary. Then, click **Send to Added Students** to send them the first nudge. When you add students to a campaign that has already been sent, you should see an option to **send to all** or **only send to newly added recipients** before saving.

Compose Nudge Email for Newly Added Students

Subject \*

{Student\_first\_name}, Schedule an Advising appointment

Message \*

**B I** : : @ Heading 2 Merge Tags ↶ ↷

**Please Schedule Your Advising Appointment.**

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

Thank you for your interest in a major or minor within the UWM School of Education. I'm excited to start working with you.

The next step is to schedule an appointment with me to explore your major of interest within the School of Education. 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}

Cancel Send To Added Students

**NOTE:** Other scheduled nudges that haven't been sent will also be sent to those newly added students without having to perform any other actions. Appointment Campaign links are individual to each student, so you cannot forward them.

## RELATED ARTICLES FROM THE NAVIGATE360 HELP CENTER

To access the [Navigate Help Center articles](#), you must first go into Navigate360 > Help > Explore Help Center and keep it opened in a tab.

- [Overview of Appointment Campaigns](#)
- [Launching an Appointment Campaign](#)
- [Overview of My Availability](#)
- [Appointment Campaign FAQ & Troubleshooting](#)