

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**.

Appointment Campaigns > SOE Major Change

05/19/2023 - 01/31/2024

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

New Student(s) Nudged

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 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.

Edit Appointment Campaign: SOE Major Change

Define Campaign

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

Campaign Configurations

Campaign Name * SOE Major Change

Care Unit * Advising

Review Recipients in Campaign

Actions ▾

Remove Selected Users

Brisban, Johnson

Maltez, Brianna

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 6	APPOINTMENTS MADE 50% 3 Students	APPOINTMENTS ATTENDED 33% 2 Students	SUMMARIES CREATED 66% 2 Students
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Nudge Metrics

New Student(s) Nudged

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?	From Last Name?	To Last Name?	Student ID?
Gender	Race or Ethnicity	Preferred Name?	Student List (In Any of These)	
All	All		All	
Transfer Student				

Add Recipients To Campaign

Unsaved Student Search Save

First Name: Rita X Last Name: Paws X

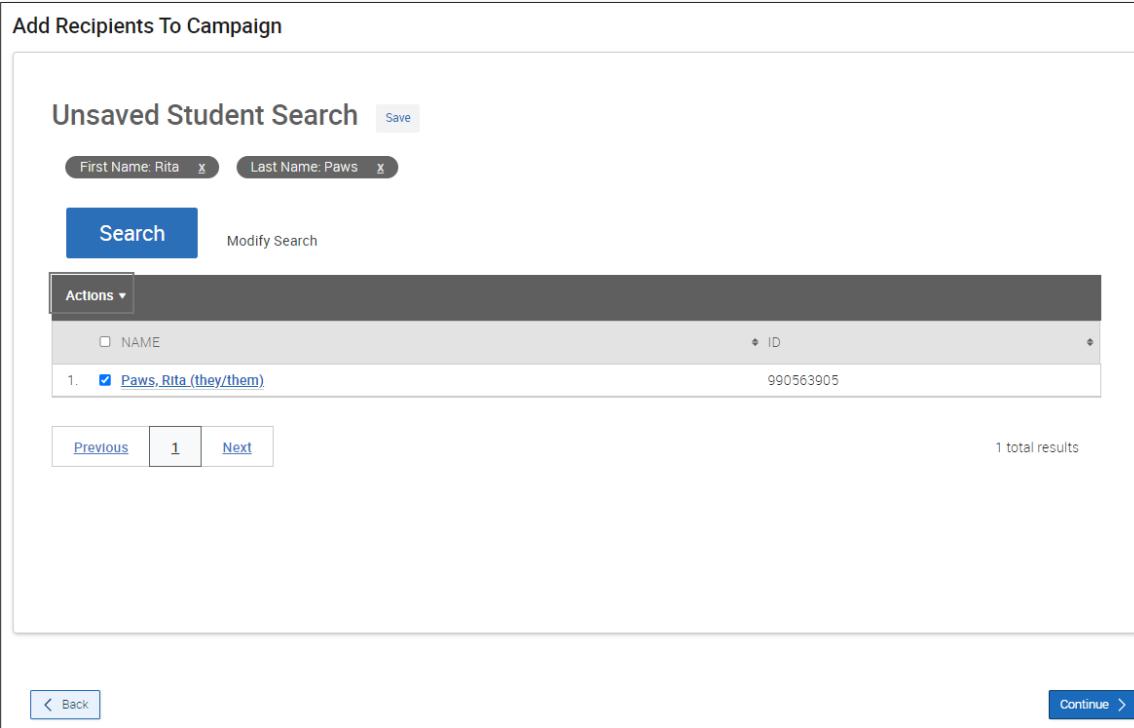
Search Modify Search

Actions ▾

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

Previous 1 Next 1 total results

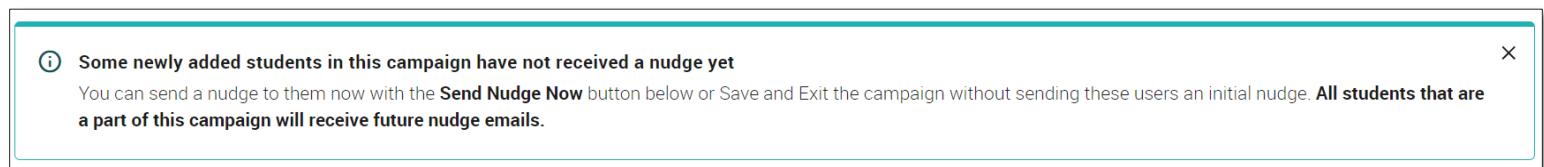
< Back Continue >



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.

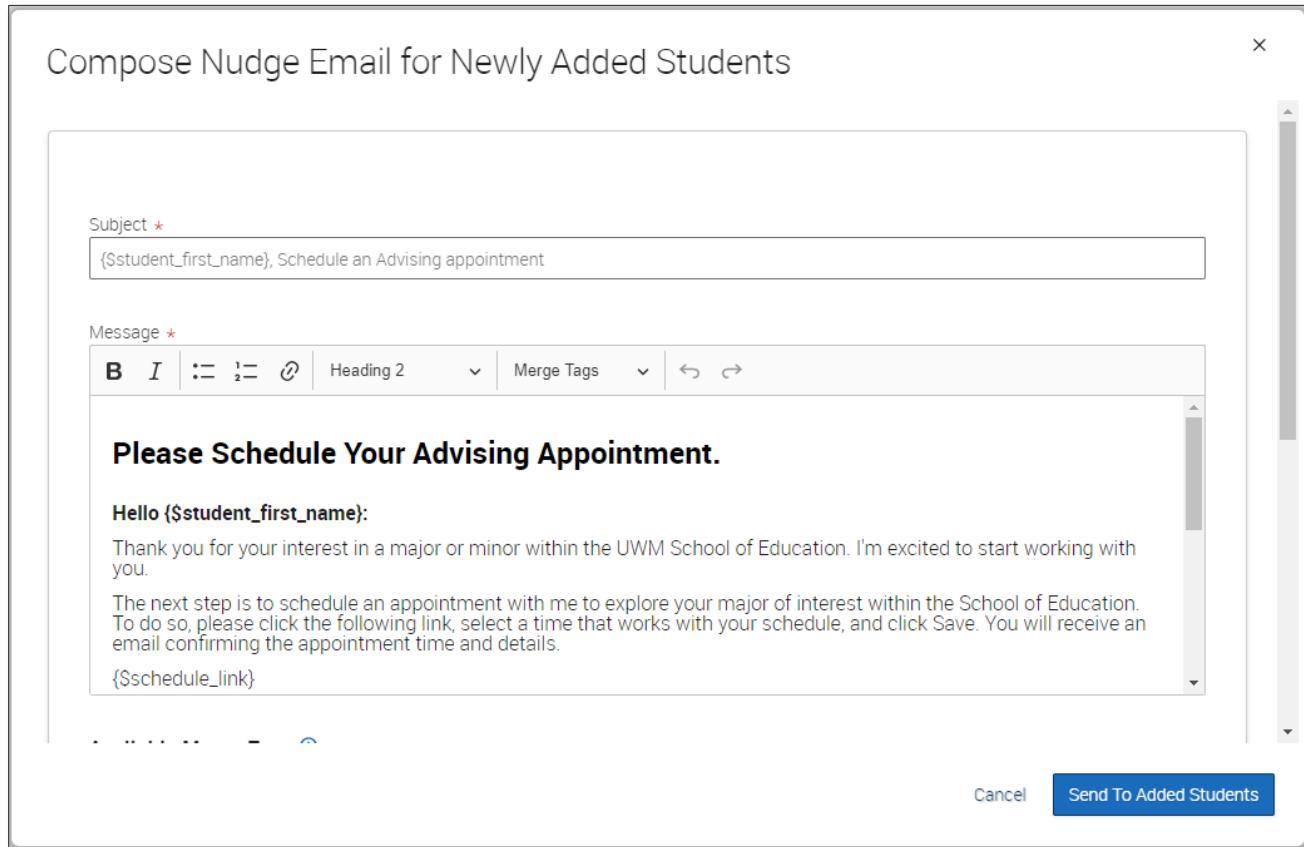
(i) Some newly added students in this campaign have not received a nudge yet X

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

4. 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.



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](#)