

Creating a Messaging Campaign for Advisors

1. **Navigating to Campaigns:** Click on the Bullhorn Icon on the right-hand navigation bar, then click on Messaging Campaigns. This will take you to the Messaging Campaigns page. Click on the blue “Add New” Button.
2. **Launching a new Appointment Campaign**
 - a. **Define Campaign:**
 - i. **Campaign Name:** Please include at least your last name, department, and a brief description of the purpose of the campaign. This will help the CCNY Navigate team locate the campaign. Example: **B. Smith Fall 2023 Basket Weaving Information Session.** (Students will not see the name of the campaign)
 - ii. **Tracking URL:** The URL you want students to click. This will show in an SMS nudge.
 - iii. **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.
 - b. **Adding Recipients to Campaign:**
 - i. If you created this campaign directly from a Student List or Saved Search, you are asked to review your students. If not, an Advanced Search opens.
 - ii. Use Advanced Search filters to find and select students. Click the “Search” button.
 - iii. Select the students that you want to include. To select all students, click the selection box next to “NAME.” **NOTE:** If there are more than 100 students in your section you will need to click on the link in the top center of the list box to select all students. See below:

Unsaved Student Search Save

Course: Registered in ANTH-10100 Introduction to Anthropology (5), From: 2023 Spring , To: 2023 Spring x

Search

Modify Search

Actions ▾	
NAME	ID
100 items on this page are selected. Select all 120 items.	
<input checked="" type="checkbox"/> Abad, Tahsin	24334700
<input checked="" type="checkbox"/> Abousalham, Anas	24358444
<input checked="" type="checkbox"/> Abraham, Alex	24297182
<input checked="" type="checkbox"/> Addison, Michelle	24092571
<input checked="" type="checkbox"/> Ahmed, Adil	24298822
<input checked="" type="checkbox"/> Ahmed, Daud	23917828
<input checked="" type="checkbox"/> Ahmed, Tawhid	24182967
<input checked="" type="checkbox"/> Alam, Ashraf	24354363

- iv. Click “ Continue”
 - v. The “Review Recipients in Campaign” screen will appear. Here you can remove any students from the recipient list. Just select the box next to their name and then select “Remove Selected User” in the Action menu.
 - vi. Once the list is set, click “Continue.”
- c. **Compose Your Messaging:** On this screen, you will be able to create a variety of messages to invite students to schedule their appointments. A “Welcome Message” is required, and it is recommended that you create at least one “Nudge” or reminder.
- i. **Welcome Message:** This is the original email that alerts students about the campaign and invites the student to schedule an appointment.
 - 1. Click “Add Welcome Message”
 - 2. On the editing screen you will see a template on the left-hand side. You can use this text or create your own. Any edits you make will show in the preview on the right-hand side of the screen.
 - a. NOTE: DO NOT remove the `{tracking_hyperlink}` tag.
 - 3. You can attach a document to the Welcome message.
 - 4. Select a date for the Welcome Message to be sent.
 - 5. Click “Save Welcome Message.”
 - ii. **Nudge:** Send a reminder a few days after the Welcome Message. We recommend you send this message as a text message. This
 - 1. Click “Add Nudge.”
 - 2. Nudge Type: select “SMS”
 - 3. Compose your text on the left-hand side of the screen. NOTE: You are limited to 160 characters which include the scheduling link. Keep an eye on the character count on the preview screen on the right-hand side of the screen.
 - 4. Select a send date. NOTE: The system will only allow one message to be sent on any given date.
 - 5. Click “Save Nudge.”
 - iii. Click “continue.”
- d. **Confirm & Send:** Review the details of your campaign. When you are ready, click “Start Campaign.” Please note that our experience is that students will begin to schedule appointments immediately.