

## 12. Campaigns: Messaging Campaigns



**What: Messaging Campaigns** let staff reach out to specific student populations and encourage them to take certain actions.

**Where:** You can access Messaging Campaigns via the **Quick Links** section of the Staff Home page or by opening the Campaigns page by clicking the **Campaigns icon** on the blue navigation bar.

**Who:** Messaging Campaigns are best employed by **staff** members seeking to encourage students to take certain campaign actions.

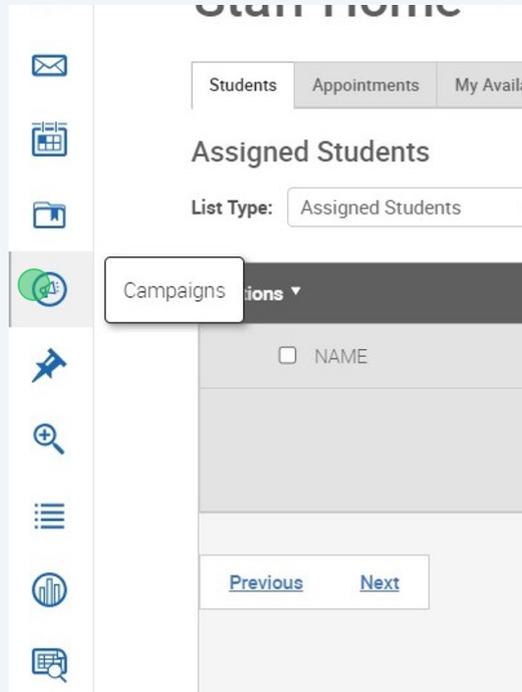
**Conditions:** In order for Messaging Campaigns to work successfully, you must have ability to create Messaging Campaigns. You will also need to have access to Advanced Search to create a list of students for your campaign and the permission to text students from Navigate to use the SMS messaging aspect.

1

Navigate to <https://csus.campus-training2.eab.com/home>

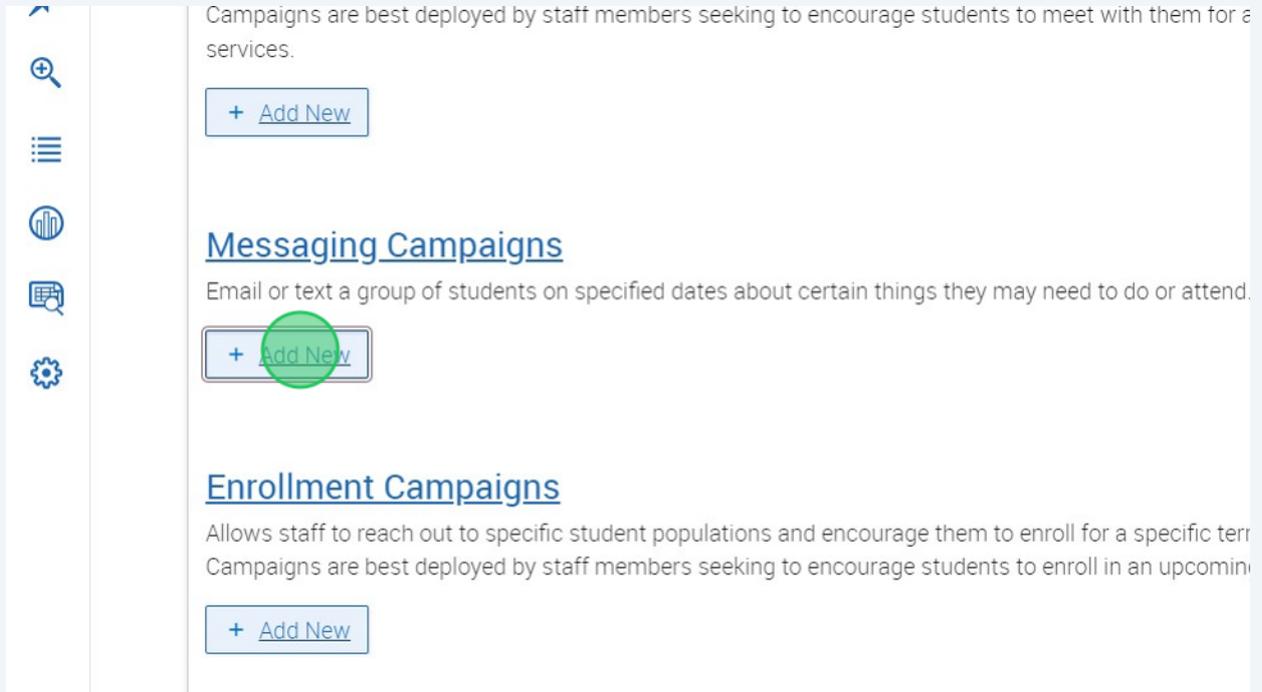
## 2 Feature Overview

Open Messaging Campaigns by going to the **Campaigns** page and selecting the **Messaging Campaigns** link. To learn more about launching a Messaging Campaign, see [Launching an Messaging Campaign](#).



### 3 Launching a Messaging Campaign

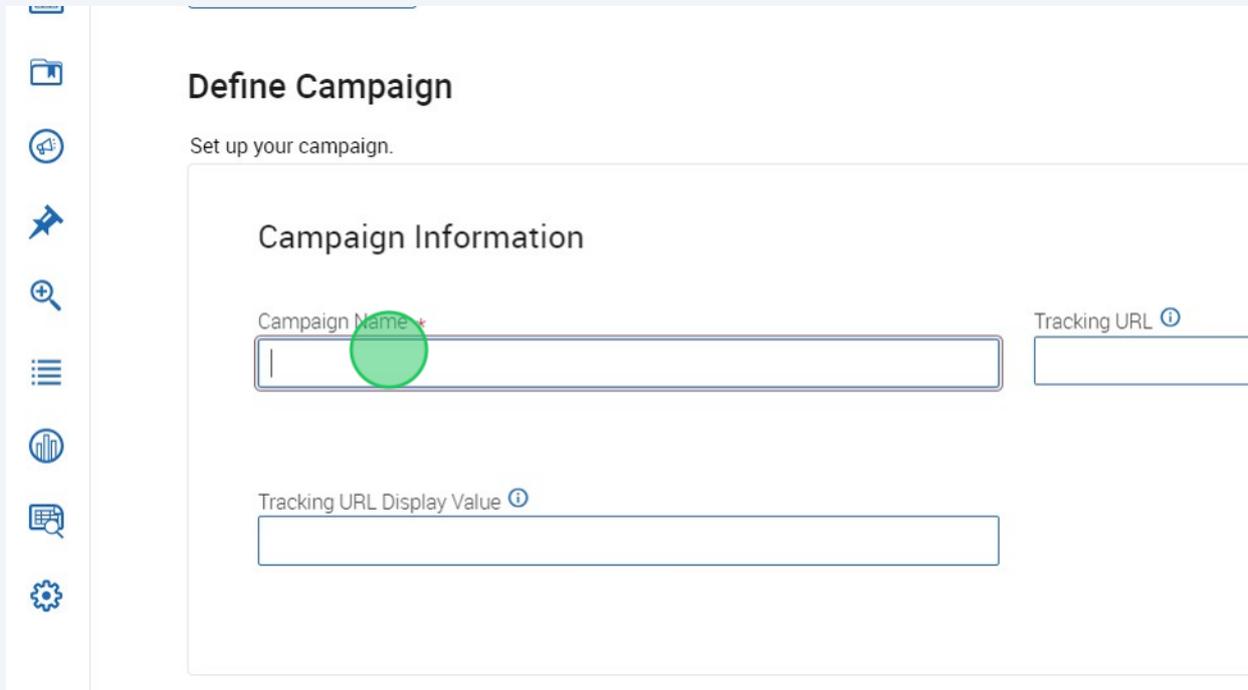
To begin, open the **Campaigns** page and select **Add New** from the Messaging Campaigns section.



The screenshot shows a web interface with a left sidebar containing navigation icons: a home icon, a magnifying glass, a list icon, a bar chart, a speech bubble, and a gear. The main content area has a header with the text "Campaigns are best deployed by staff members seeking to encourage students to meet with them for a services." Below this is a blue button labeled "+ Add New". The next section is titled "Messaging Campaigns" and includes the text "Email or text a group of students on specified dates about certain things they may need to do or attend." A blue button labeled "+ Add New" is highlighted with a green circle. The final section is titled "Enrollment Campaigns" and includes the text "Allows staff to reach out to specific student populations and encourage them to enroll for a specific term. Campaigns are best deployed by staff members seeking to encourage students to enroll in an upcoming". Below this is another blue button labeled "+ Add New".

## 4 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.



**Define Campaign**

Set up your campaign.

**Campaign Information**

Campaign Name \*

Tracking URL ⓘ

Tracking URL Display Value ⓘ

## 5 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.

## 6 Tracking URL

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

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

### Define Campaign

> your campaign.

#### Campaign Information

Campaign Name \*  
TESTING CAMPAIGN

Tracking URL ⓘ  
Enter the tracking URL used for capturing email campaign analytics data. Include the full URL with http:// or https://.

Tracking URL Display Value ⓘ

Cancel Save and E

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## 7 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.

#### Campaign Information

Campaign Name \*  
TESTING CAMPAIGN

Tracking URL ⓘ  
https://www.csus.edu/

Tracking URL Display Value ⓘ

Cancel

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Click "Continue"

Y-SACRAMENTO

Messaging Campaign

SACRAMENTO STATE  
Redefine the Possible

Campaign — Select Recipients — Compose/Undo — Confirm & Send

**Campaign**

Campaign Information

Name \*  Tracking URL

URL Display Value

Timeline

- Campaign Name Pending Setup...
- Recipients Pending Setup...
- Welcome Message Pending Setup...

Save and Exit **Continue**

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Support

## 9 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.

Use New Search to filter/sort students and upload student list - Click "Student Information, Enrollment History, Area of Study, Term Data, Performance Data, Course Data, and Assigned to for more details.

The screenshot displays the 'Add Recipients To Campaign' interface. At the top, there are navigation buttons: 'Define Campaign', 'Select Recipients' (highlighted), 'Compose Nudges', and 'Confirm & Send'. Below this is the 'Add Recipients To Campaign' section, which contains a 'New Search' form. The form includes a 'Saved Searches' dropdown, a 'Keywords (First Name, Last Name, E-mail, Student ID)' input field, and several filter categories with dropdown menus: 'Student Information' (highlighted with a green circle), 'Enrollment History', 'Area of Study', 'Term Data', 'Performance Data', 'Course Data', and 'Assigned To'. A blue button is visible at the bottom of the form.

## 10 Should you have a student list from your EAB "List and Saved Items" Tab

**11** Click the "Student List (In Any of These)" field.

Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List

Last Name?	From Last Name?	To Last Name?	Student ID?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Race or Ethnicity	Student List (In Any of These)		Transfer Student
All	All		Any
Category (In Any of these)?			
All			

**12** Upload the student list that you have saved

Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List

Last Name?	From Last Name?	To Last Name?	Student ID?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Race or Ethnicity	Student List (In Any of These)		Transfer Student
All	<input type="text"/>		Any
Category (In Any of these)?			
All			

Concentration. Major

### 13 Click "Search"

The screenshot shows a search filter interface. On the left is a vertical sidebar with icons for a menu, analytics, chat, and settings. The main area contains several filter sections: 'Course?' with a dropdown menu set to 'All'; 'Assigned To' with a 'Student has relationship' dropdown set to 'Any' and a 'More Assignments' link; 'Staff' with a text input field containing 'All'; and 'Assigned to Team Members?' with a dropdown menu set to 'All'. At the bottom, there is a 'Search' button highlighted with a green circle, and three checkboxes: 'Include Inactive', 'My Students Only', and 'At-Risk Students Only', all of which are currently unchecked.

### 14 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.

The screenshot shows the 'Unsaved Student Search' results page. At the top, there is a 'Save' button and a tag that says 'In Student List: TEST 1234'. Below this are a blue 'Search' button and a 'Modify Search' link. A dark grey 'Actions' dropdown menu is open, with a green circle highlighting a checkbox next to the word 'NAME'. Below the dropdown is a list of six students, each with a checkbox and a name link: 1.  [Brown, Emily](#); 2.  [Cruz, Steph](#); 3.  [Furnary, Paige](#); 4.  [Martinez, Nathan](#); 5.  [Nielsen, Clay](#); 6.  [Penjehpour, Shahrir](#).

15 Click this button field.

**Add Recipients To Campaign**

Unsaved Student Search Save

In Student List: TEST 1234 x

**Search** Modify Search

**Actions** ▾

- NAME

- [Brown, Emily](#)
- [Cruz, Steph](#)
- [Furnary, Paige](#)

16 Click "Continue"

Y-SACRAMENTO

Testing Campaign: TESTING CAMPAIGN

SACRAMENTO STATE  
Redefine the Possible

Campaign > [Select Recipients](#) > [Compose Messages](#) > [Confirm & Send](#)

**Recipients To Campaign**

**Recipients in Campaign**

Selected Users

- Brown, Emily
- Cruz, Steph
- Furnary, Paige
- Gomez, Nathan
- Isen, Clay
- Jefpou, Shahriar
- Kell, Jacob
- Lee, Karina
- Miguez, Jacqueline

[Add More Students](#)

**Timeline**

- Name: TESTING CAMPAIGN
- Recipients Pending Setup
- Welcome Message Pending Setup

[Save and Exit](#) **Continue** [Support](#)

17 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.

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

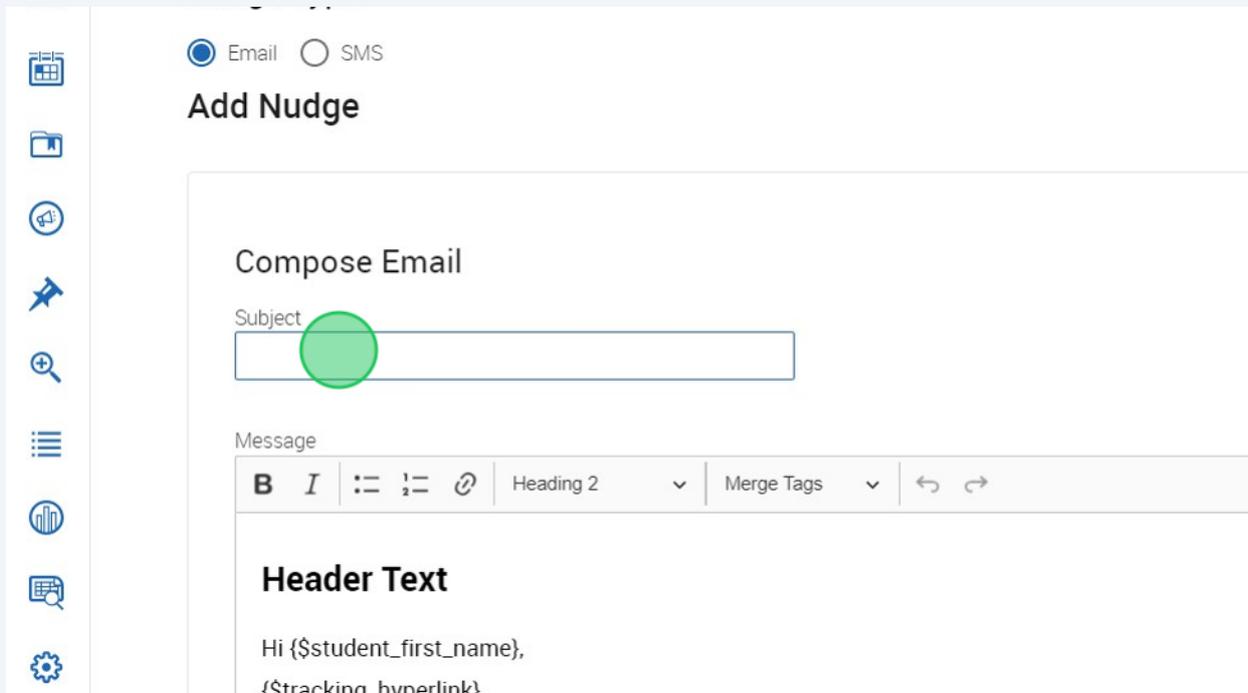
[< Back](#)

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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.



The screenshot displays the 'Add Nudge' interface. At the top, there are radio buttons for 'Email' (selected) and 'SMS'. Below this is the title 'Add Nudge'. The main content area is titled 'Compose Email' and contains a 'Subject' field with a green circle highlighting the start of the input box. Below the subject field is a 'Message' section with a rich text editor toolbar. The toolbar includes buttons for bold (B), italic (I), bulleted list, numbered list, link, heading 2, merge tags, and undo/redo. The message content shows a bolded 'Header Text' followed by a line of text: 'Hi {\$student\_first\_name},' and a line with a placeholder for a tracking hyperlink: '{\$tracking\_hyperlink}'.

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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.

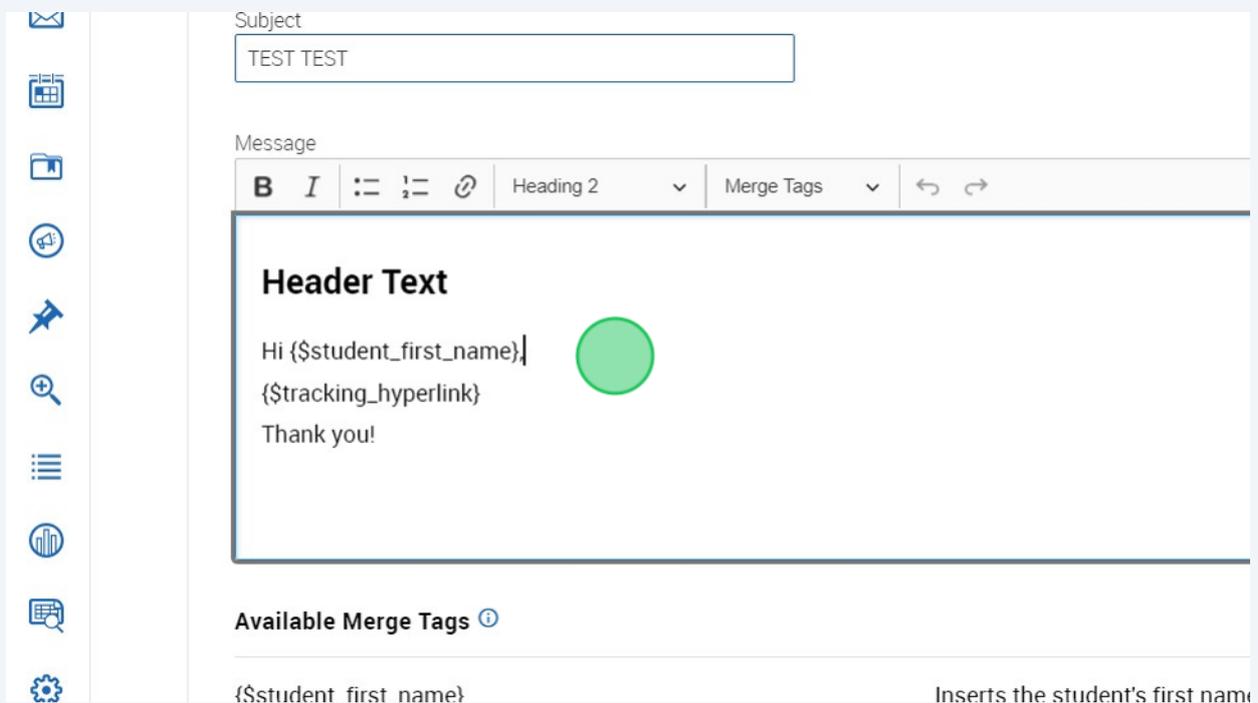
**Message** The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.

**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.



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Upload Attachments/Pick a date and click "Save Welcome Message" once complete

NAVIGATE

Header Text

Hi {Student\_first\_name},  
JOIN US FOR A STUDY SESSION! {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
{Personal_availability_link}	Inserts your Personal Availability Link

Add Attachment:

Choose File | No file chosen

Send Date: October 10, 2023

Previous Nudge Dates: N/A  
Current Nudge Dates: N/A

Cancel Save Welcome Message

Header Text

Hi Andrew,  
JOIN US FOR A STUDY SESSION! [CLICK HERE FOR MORE DETAILS](#)  
Thank you!

NAVIGATE

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Click "Add Nudge" for more messages/reminders

Compose Nudges

Nudges

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

Add Nudge

Send Date: 10/10/2023

Email Subject: TEST TEST

Email Message: Header TextHi {Student\_first\_name},JOIN US FOR...

## 22 Add Subject to Email

Email  SMS

### Add Nudge

#### Compose Email

Subject

Message

**B** *I* Heading 2 Merge Tags

#### Header Text

Hi {\$student\_first\_name},  
{Tracking\_hyperlink}

## 23 Add Message to Email, Upload Attachments, and Pick a date

CALIFORNIA STATE UNIVERSITY - SACRAMENTO

NAVIGATE

Nudge Type

Email  SMS

### Add Nudge

#### Compose Email

Subject

TEST REMINDER

Message

**B** *I* Heading 2 Merge Tags

#### Header Text

Hi {\$student\_first\_name},  
{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
{Personal_availability_link}	Inserts your Personal Availability Link

Add Attachment:

Choose File No file chosen

Send Date

#### Preview Email

TEST REMINDER

SACRAMENTO STATE

#### Header Text

Hi Andrew,  
[CLICK HERE FOR MORE DETAILS](#)  
Thank you!

NAVIGATE

## 24 Click "Save Nudge"

STATE UNIVERSITY - SACRAMENTO

Message

**Header Text**

Hi (\$Student\_first\_name),  
DON'T FORGET TO STOP BY THE LIBRARY TO STUDY WITH STUDY PARTNERS (\$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
(\$personal_availability_link)	Inserts your Personal Availability Link

Add Attachment:  
Choose File No file chosen

Send Date: October 13, 2023

Previous Nudge Dates: N/A  
Current Nudge Dates: 10/10/2023

Cancel **Save Nudge**

SACRAMENTO STATE  
**Header Text**  
Hi Andrew,  
DON'T FORGET TO STOP BY THE LIBRARY TO STUDY WITH STUDY PARTNERS [CLICK HERE FOR MORE DETAILS](#)  
Thank you!

NAVIGATE

## 25 Click "Continue"

CALIFORNIA STATE UNIVERSITY - SACRAMENTO

NAVIGATE

Messaging Campaign: TESTING CAMPAIGN

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 Nudge

Send Date: 10/10/2023	✎	🗑
Email Subject: TEST TEST		
Email Message: Header Text(\$Student_first_name),JOIN US FOR...		
Send Date: 10/13/2023	✎	🗑
Email Subject: TEST REMINDER		
Email Message: Header Text(\$Student_first_name),DON'T FORGE...		

**Timeline**

- Name: TESTING CAMPAIGN
- Recipients: 11
- Welcome Message: TEST TEST  
Tue 10/10/2023
- Scheduled Nudge: TEST REMINDER  
Fri 10/13/2023

< Back Save and Exit **Continue**

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Support

## 26

## Confirm and Send

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

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.

The screenshot shows a web interface for managing a campaign. At the top, the browser address bar shows 'Y-SACRAMENTO'. The page title is 'Testing Campaign: TESTING CAMPAIGN'. The Sacramento State logo is in the top right corner. Below the title, there are navigation buttons: 'Verify Recipients', 'Compose Nudges', and 'Confirm & Send'. The main content area is titled 'Send' and contains a 'Campaign Summary' section. This section displays the following details:

<b>Campaign</b>	Name:	TESTING CAMPAIGN
	Tracking URL:	https://www.csus.edu/
	Tracking URL Text:	CLICK HERE FOR MORE DETAILS
	Recipient:	Timothy Duong
		<a href="#">View 11 recipients</a>

Below the summary, there are two sections: 'Message' and 'Nudge'.

<b>Message</b>	Send Date:	Tue 10/10/2023
	Subject:	TEST TEST
	Email Preview:	<a href="#">View Email</a>

<b>Nudge</b>	Send Date:	Fri 10/13/2023
	Subject:	TEST REMINDER
	Email Preview:	<a href="#">View Email</a>

At the bottom right of the page, there are two buttons: 'Save and Exit' and 'Start Campaign'.