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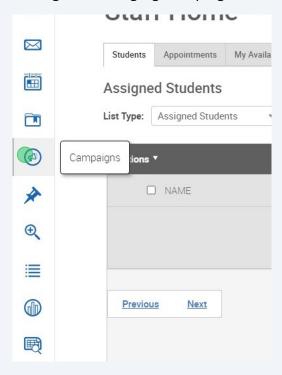
Conditions: In order for Messaging Campaigns to work successfully, you must have ability to create Messaging Campaigns. You will also need to have access to Advanced Search to create a list of students for your campaign and the permission to text students from Navigate to use the SMS messaging aspect.

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.

Campaigns are best deployed by staff members seeking to encourage students to meet with them for a services.

+ Add New

Messaging Campaigns

Email or text a group of students on specified dates about certain things they may need to do or attend.

+ Add New

Enrollment Campaigns

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

+ 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.
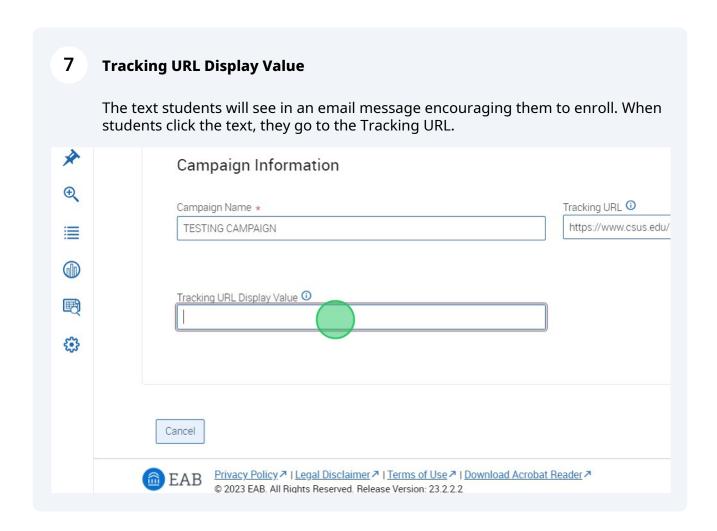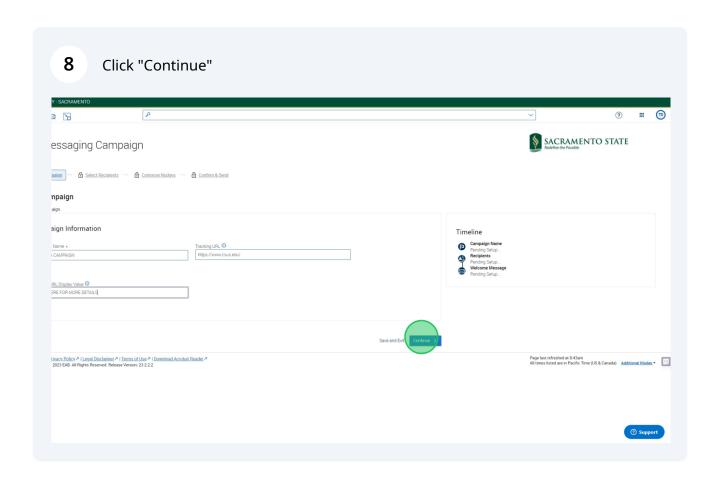

5   Campaign Name

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.

ine Campaign

o 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

EAB   Privacy Policy ↗ | Legal Disclaimer ↗ | Terms of Use ↗ | Download Acrobat Reader ↗

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

🏛 EAB   Privacy Policy ↗ | Legal Disclaimer ↗ | Terms of Use ↗ | Download Acrobat Reader ↗
© 2023 EAB. All Rights Reserved. Release Version: 23.2.2.2
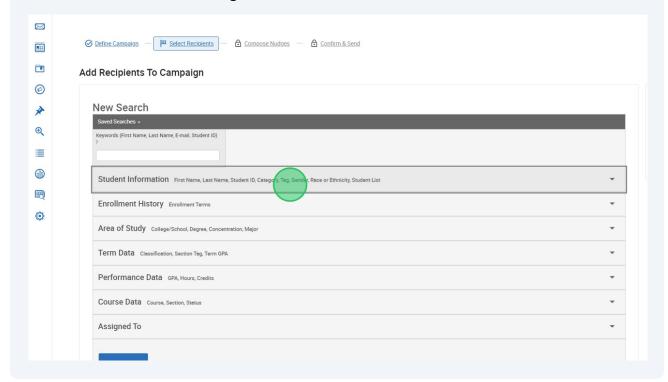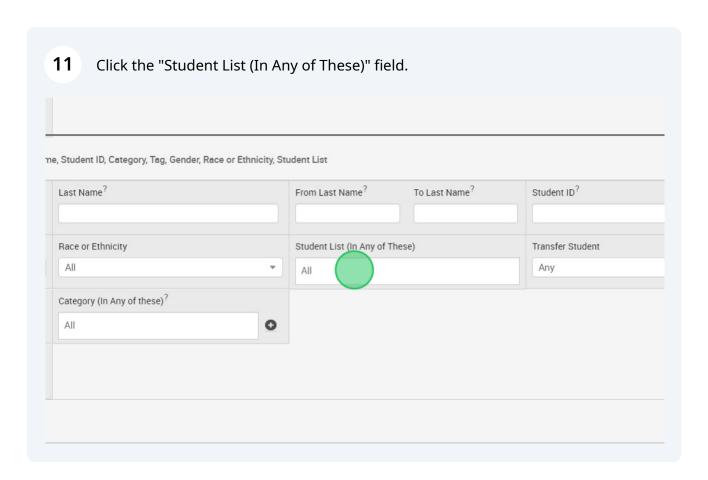
8   Click "Continue"
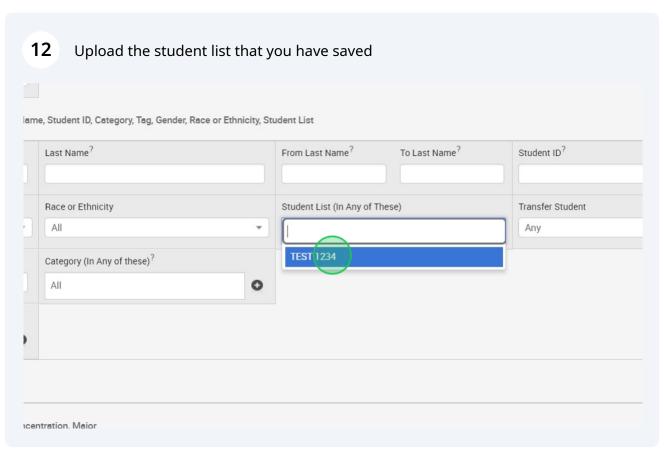
9 Add Students to Campaign

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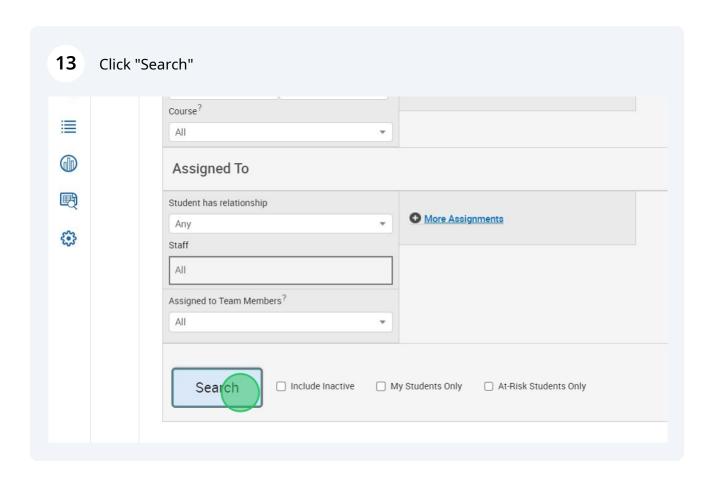
Use New Search to filter/sort students and upload student list - Click "Student Information, Enrollment History, Area of Study, Term Data, Performance Data, Course Data, and Assigned to for more details.
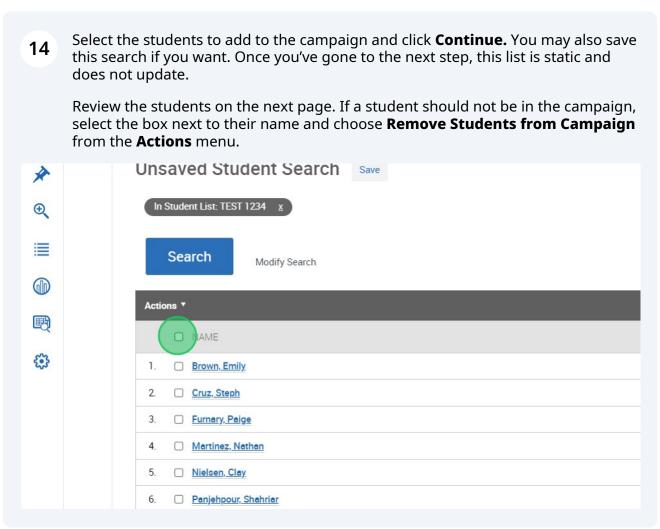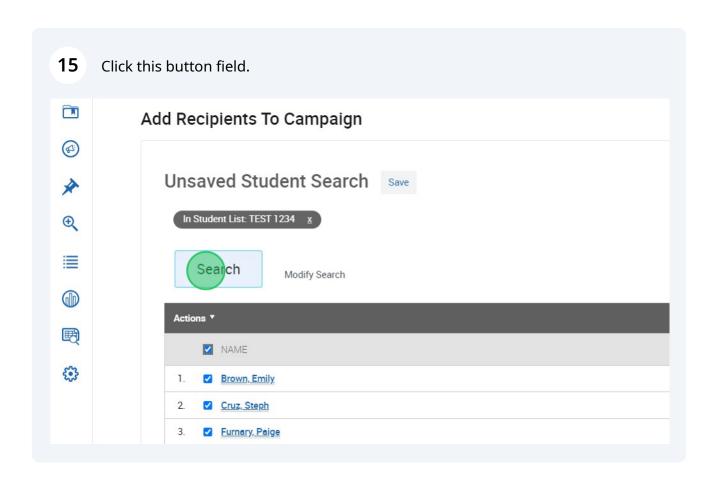

10 Should you have a student list from your EAB "List and Saved Items" Tab

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

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

Last Name?	From Last Name?	To Last Name?	Student ID?

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

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

Last Name?	From Last Name?	To Last Name?	Student ID?

Race or Ethnicity	Student List (In Any of These)	Transfer Student
All ▼		Any

TEST 1234

Category (In Any of these)?

All ⊕

ncentration. Maior

13 Click "Search"

Course?

All ▼

Assigned To

Student has relationship

Any ▼

Staff

All

Assigned to Team Members?

All ▼

⊕ More Assignments

Search   ☐ Include Inactive   ☐ My Students Only   ☐ At-Risk Students Only

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.

Unsaved Student Search   Save

In Student List: TEST 1234   x

Search   Modify Search

Actions ▾

	☐ NAME
1.	☐ Brown, Emily
2.	☐ Cruz, Steph
3.	☐ Furnary, Paige
4.	☐ Martinez, Nathan
5.	☐ Nielsen, Clay
6.	☐ Panjehpour, Shahriar

15   Click this button field.

Add Recipients To Campaign

Unsaved Student Search   Save

In Student List: TEST 1234   x

Search   Modify Search

Actions ▼

☑	NAME
1. ☑	Brown, Emily
2. ☑	Cruz, Steph
3. ☑	Furnary, Paige

16   Click "Continue"

Y - SACRAMENTO

ging Campaign: TESTING CAMPAIGN

SACRAMENTO STATE
Redefine the Possible

paign — Select Recipients — Compose Nudges — Confirm & Send

ients To Campaign

Recipients in Campaign

Selected Users

wn, Emily
z, Steph
nary, Paige
rtinez, Nathan
lsen, Clay
njehpour, Shahriar
well, Jacob
es, Karina
driguez, Jacqueline

Timeline

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

Add More Students   Save and Exit   Continue >   ⑦ 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.

18 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.

19 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.
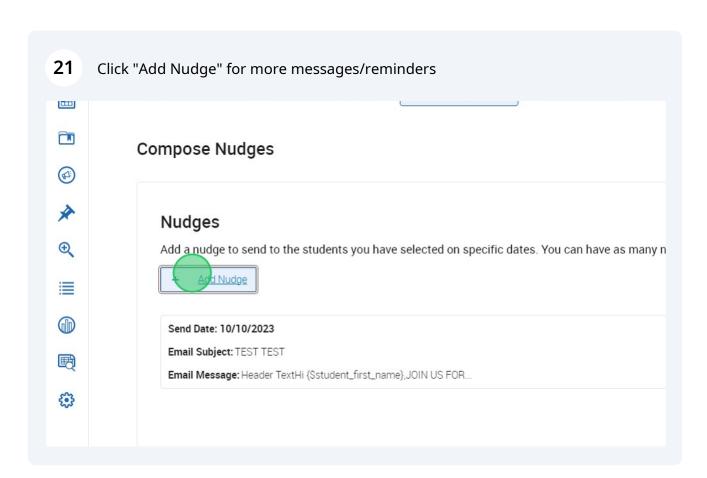
Important. Your Messaging Campaign "ends" when your last message is sent. You can continue to add Nudges after the last message is sent, if this is helpful to your Messaging Campaign.
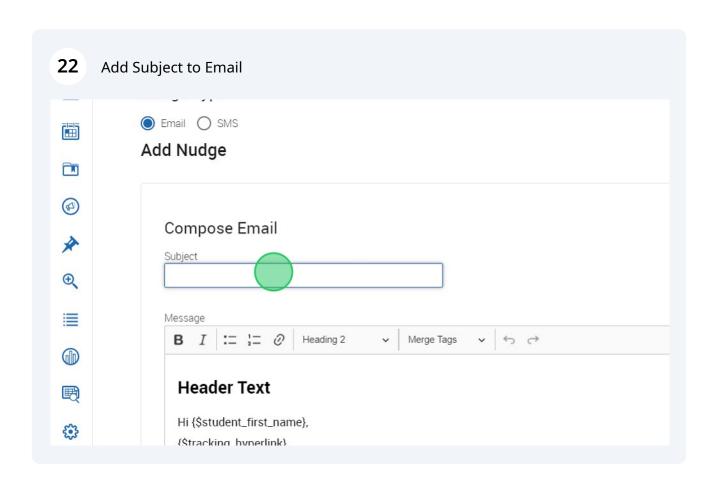
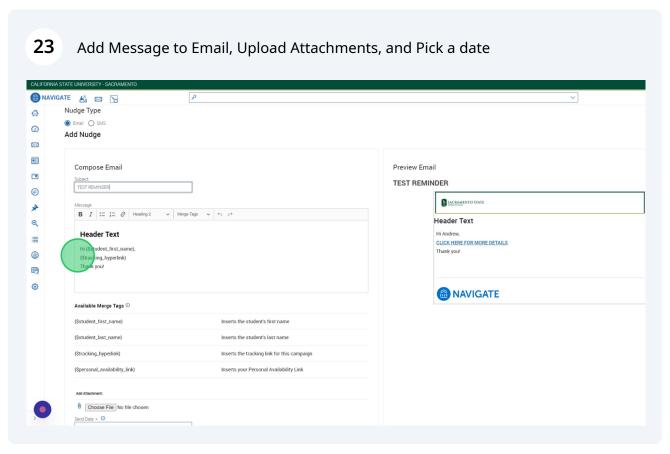When you select the SMS nudge type, the Compose SMS page displays.

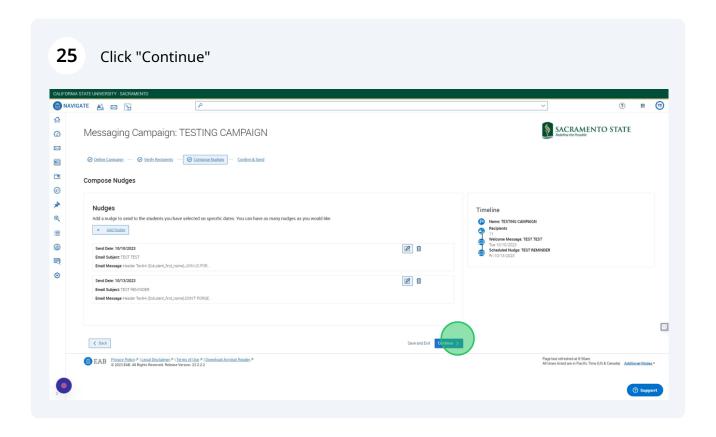**20**   Upload Attachments/Pick a date and click "Save Welcome Message" once complete

21   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

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

24 Click "Save Nudge"

25 Click "Continue"

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.