Automations are a powerful tool that allow users to send messages to students automatically. Using automations can greatly increase the number of notifications sent from Navigate360 so we recommend restricting the number of users who can use them.

Prerequisites for Creating Send Message Automations
To create send message automations, users need to have most of the following permissions:
- **Create, Edit, and Delete Send Message Automations**, which allows the user to create the automation.
- **View the Search Page and Search for Students**, so they can search for students and save searches if using Saved Searches to create the automation.
- **View and Search Using the Advanced Search Filters** is not strictly necessary but will probably be needed to create robust saved searches if they are using these to create their automation.
- **Various Standard Report permissions** if the user is creating automations from V3 reports, they need to have access to at least one relevant report.
- **Allow User to Email Students** or **Allow User to Text Students** to have the ability to send the message.

If the user has these permissions, they should create a Saved V3 Report OR a Saved Search to create the Send Message automation from. The directions to create a Saved Search is here. The directions to create a Saved V3 Report are here. This guide assumes you have either a saved search or a saved V3 report that you want to use to create an automation ready; it will not explain how to create these in this article.

Creating a Send Message Automation
First Steps: Saved Search
Open the **Lists and Saved Items** page. Navigate to the Automations table and select **New Automation**.

Automations

Use automations to apply common actions to your saved searches on a recurring basis. Note: this list contains automations associated with either a Saved Search or V3 Saved Report.

	NAME	STATUS	AUTOMATION TYPE	SEARCH OR REPORT	# MATCHES FOUND	# ACTIONS TAKEN	# MATCHES OMITTED
☐	Transfer Support Alert	Active	Send a Message - E-mail	Alerts-Last-60-Days (Alerts Report)	12	12	0

Actions ▾   New Automation

The New Automation page opens. Enter the Automation
Name.

New Automation Configuration

When you activate your automation, we will run your
saved search or report at the frequency you specify
below. New students who match your criteria will have
the automation action applied according to the rules
you specify below.

Automation Name *

[   ]

☑ Automation is active ⓘ

Enter the Automation Conditions. Select a Saved Search from the dropdown. Choose **Send
Message** from the *THEN... take this action* field. If desired, check the *Omit initial matches* box,
which identifies and omits initial matches from future automation runs. You may want to do this
if (for example) your intent is to automatically send a welcome message to student when they

are assigned to you, so that students already assigned to you don't get a redundant message.

First Steps: Saved V3 Report
There are two places you can initiate a new automation for a Saved V3 Report: the **Lists and Saved Items** page on the Automations table or the **My Report Automations** tab on the **Reports** page.

If you are creating an automation from the **Lists and Saved Items** page, select the **New Automation** button on the table. If you are creating an automation on the **My Report Automations** tab, select the **Add Automation** button.

The New Automation page opens. Enter the Automation Name.

Enter the Automation Conditions. Select a Saved Report from the dropdown. Choose **Send Message** from the *THEN... take this action* field. If desired, check the *Omit initial matches* box, which identifies and omits initial matches from future automation runs. You may want to do this if (for example) your intent is to automatically send a welcome message to student when they are assigned to you, so that students already assigned to you don't get a redundant message.

Creating the Message and Saving the Automation
Next, create your message. Users may create EITHER a recurring email or a recurring text to be sent to the students, not both.
Email messages have a rich text editor and the ability to add the merge fields *Recipient Name, Recipient First Name,* and *Recipient Last Name.* Users can also add attachments or use a Content Template. If desired, they can also preview the message or send a sample of it to themselves.

Text messages are restricted to 160 characters and do not have formatting options beyond using a Content Template. All text messages sent via automation will come from either your Bulk Messaging Number or a short code which students are not able to reply to.

After entering the Automation Conditions, it's time to enter the Automation Schedule.

Automation Schedule

Specify how long the automation should run. Then choose how often you want to check for new students that match the criteria. Any new students who meet the criteria will be added to the automation and the action will be applied on this schedule. You will be notified by email 2 hours before each automation run. You will be able to review a list of students included in the automation and have the opportunity to cancel an automation run or to omit individual students.

Automation Duration
How long would you like your automation to run?

Start
[January 1, 2024 ∨]

End
[April 1, 2024 ∨]

Automation Frequency
How often should we check for new matches? The selected action will be processed at the interval and time of day in your institution's time zone, subject to processing time delays.

○ Daily

◉ Weekly

Day *
[Tuesday   ∨]

○ Monthly

Time *
[12:00 PM 🕐]

First, set your duration. For example, if you want your automation to remind students to fill out financial aid forms as shown in the screenshots above, you can have the automation occurrences run from January to April.

Next, set the automation frequency. This sets how often your automation checks for new students. Finally, set a Time. You will be notified by email two hours before each automation run, so it's best to set this two hours after you can review it.

Once everything is set, click **Save Automation**. A confirmation window opens. Click **Save as Active** to start the automation.

Managing Your Send Message Automation

After creating and saving your automation, clicking on the link for your active automation shows a page with information about the automation.

Use this page to edit the automation or generate a queued run of the automation that is not on the usual schedule. To review an upcoming automation, select **View Occurrence Details** on the Automation Details main page.

Brand New Shiny Automation: 02/22/2024 Occurrence Details

⚠ **Automation Is Queued to Run at 02/22/2024 3:01pm ET** ✕
You can view occurrence details or start or cancel this occurrence until the queued time. Changes to Saved Search, Duration, Frequency, or Time of day will not affect this occurrence, but will take effect when other runs are generated in the future.

[Process now] [Cancel this occurrence]

Options

[Edit Automation](#)
[Automation Details](#)

TOTAL MATCHES FOUND	TOTAL ACTIONS TAKEN	TOTAL MATCHES OMITTED
2536	0	0

Occurrence Information

Automation Occurrence Status
Queued

Action
Send a Message - SMS

Based on Saved Search
Pell Eligible 1st and 2nd Years (Search)

Search Scheduled For
02/22/2024 01:01 PM ET

Search Performed At
02/22/2024 01:01 PM ET
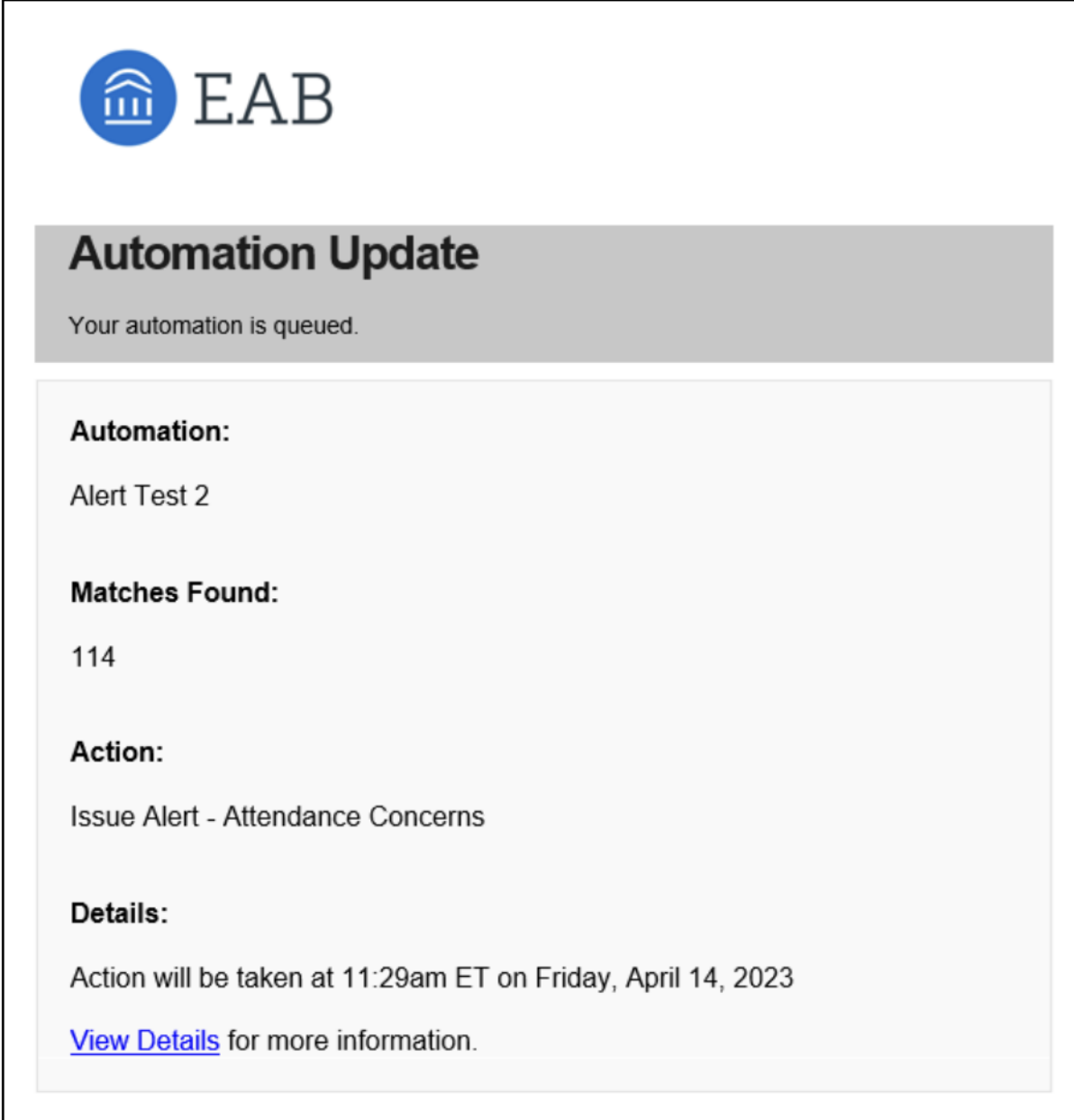
Processed At
N/A

Cancelled At
N/A

Search in Results

		NAME OF USER ⇅	ACTION TAKEN ⇅	INCLUDED ⇅	UPDATED AT ⇅	CREATED AT ⇅
☐	≡	Nicholai Aaland	No	Yes	02/22/2024, 1:01 PM ET	02/22/2024, 1:01 PM ET
☐	≡	Gaius Abby	No	Yes	02/22/2024, 1:01 PM ET	02/22/2024, 1:01 PM ET
☐	≡	Jorge Abedi	No	Yes	02/22/2024, 1:01 PM ET	02/22/2024, 1:01 PM ET
☐	≡	Elke Ablin	No	Yes	02/22/2024, 1:01 PM ET	02/22/2024, 1:01 PM ET
☐	≡	Ishana Abramov	No	Yes	02/22/2024, 1:01 PM ET	02/22/2024, 1:01 PM ET

Automation Information

Active Status
Active

? Support

Two hours before an automation occurrence runs, you receive an email notification from Navigate360 with the planned automation details.

Automation Update

Your automation is queued.

Automation:

Alert Test 2

Matches Found:

114

Action:

Issue Alert - Attendance Concerns

Details:

Action will be taken at 11:29am ET on Friday, April 14, 2023

View Details for more information.

The View Details link in the email lets you open the same Occurrence Details page as above. You can review, search for, and/or omit individual students from being included in the automation occurrence. You can process the automation immediately instead of waiting for it to be sent. Finally, you can cancel the occurrence of the automation.

When a message is sent via a Message Automation, it appears on the student's Conversations Tab like any other message.