

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.							
Actions ▾							New Automation
<input type="checkbox"/>	NAME	STATUS	AUTOMATION TYPE	SEARCH OR REPORT	# MATCHES FOUND	# ACTIONS TAKEN	# MATCHES OMITTED
<input type="checkbox"/>	<a href="#">Transfer Support Alert</a>	Active	Send a Message - E-mail	Alerts-Last-60-Days (Alerts Report)	12	12	0

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.

### Automation Conditions

Choose a Saved Search or Saved Report to specify the criteria students must meet for inclusion in your automation. Then choose the action you would like to take when students meet the Saved Search or Report criteria. Choose any additional selection based on the automation action. Note that you will need to set these up in advance.

IF... students match the criteria in this saved search or report \*

Alerts-Last-60-Days ✕ ▾

[Preview Saved Search or Report ↗](#)

THEN... take this action \*

Send Message ▾

Omit initial matches ⓘ

### 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.

### Reports

My Saved Reports   Standard Reports   **My Report Automations**

#### Report 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.

[+ Add Automation](#)

Search in Results 🔍

☰	AUTOMATION NAME	STA...	AUTOMATION TYPE	SAVED REPORT NAME	SAVED REPORT TYPE	MATCHES FOUND	ACTIONS TAKEN	MATCHES O...
☰	<a href="#">Message New Alerts</a>	Active	Send a Message - E-mail	Last 14 Days Alerts	Alerts Report	0	0	0

1 - 1 of 1   100   K < 1 > |

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.

# 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 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.

THEN... take this action \*

Send Message

Omit initial matches ⓘ

**Send Email** Send Text

### Send Email

Apply a Template ⓘ

Subject \*

Message \*

Paragraph **A** A A<sup>2</sup> AI **B** *I* @ := := ≡ ↶ ↷ 📎 ⋮

☰

- 👁 Preview Message
- ✉ Send Sample

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.

Send E-mail **Send Text**

Apply a Template ⓘ

Message \* ⓘ

Don't forget that the FAFSA is due to the FinAid Office by April 1st!

69 / 300

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.

## Save Active Automation ✕

This Automation will be saved as Active and will run on the configured schedule. Are you sure you want to continue?

Cancel
Save as Active

**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.

### Brand New Shiny Automation

**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.

View Occurrence Details
Process now
Cancel this occurrence

TOTAL MATCHES FOUND

2536

TOTAL ACTIONS TAKEN

0

TOTAL MATCHES OMITTED

0

RUN DATE	SAVED SEARCH OR REPORT NAME	SEARCHED AT	ACTION TYPE	PROCESSED AT	STATUS
02/22/2024	Pell Eligible 1st and 2nd Years	02/22/2024 1:01 PM	Send a Message - SMS		queued

**Options**

[Edit Automation](#)

[Generate Queued Run](#)

**Automation Information**

Active Status  
**Active**

Based on Saved Search  
[Pell Eligible 1st and 2nd Years \(Search\)](#)

Duration  
**02/22/2024 – 05/22/2024**

Frequency  
**Weekly, Thursday, 1:00pm ET**

Action  
**Send a Message - SMS**

Next Run Date  
**02/29/2024**

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 3:01 pm 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.

TOTAL MATCHES FOUND <h2>2536</h2>	TOTAL ACTIONS TAKEN <h2>0</h2>	TOTAL MATCHES OMITTED <h2>0</h2>
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Search in Results 🔍 📄 🗑️ ⚙️

<input type="checkbox"/>	NAME OF USER	ACTION TAKEN	INCLUDED	UPDATED AT	CREATED AT
<input type="checkbox"/>	<a href="#">Nicholai Aaland</a>	No	Yes	02/22/2024, 1:01 PM ET	02/22/2024, 1:01 PM ET
<input type="checkbox"/>	<a href="#">Gaius Abby</a>	No	Yes	02/22/2024, 1:01 PM ET	02/22/2024, 1:01 PM ET
<input type="checkbox"/>	<a href="#">Jorge Abedi</a>	No	Yes	02/22/2024, 1:01 PM ET	02/22/2024, 1:01 PM ET
<input type="checkbox"/>	<a href="#">Elke Ablin</a>	No	Yes	02/22/2024, 1:01 PM ET	02/22/2024, 1:01 PM ET
<input type="checkbox"/>	<a href="#">Ishana Abramov</a>	No	Yes	02/22/2024, 1:01 PM ET	02/22/2024, 1:01 PM ET

**Options**

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

**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**

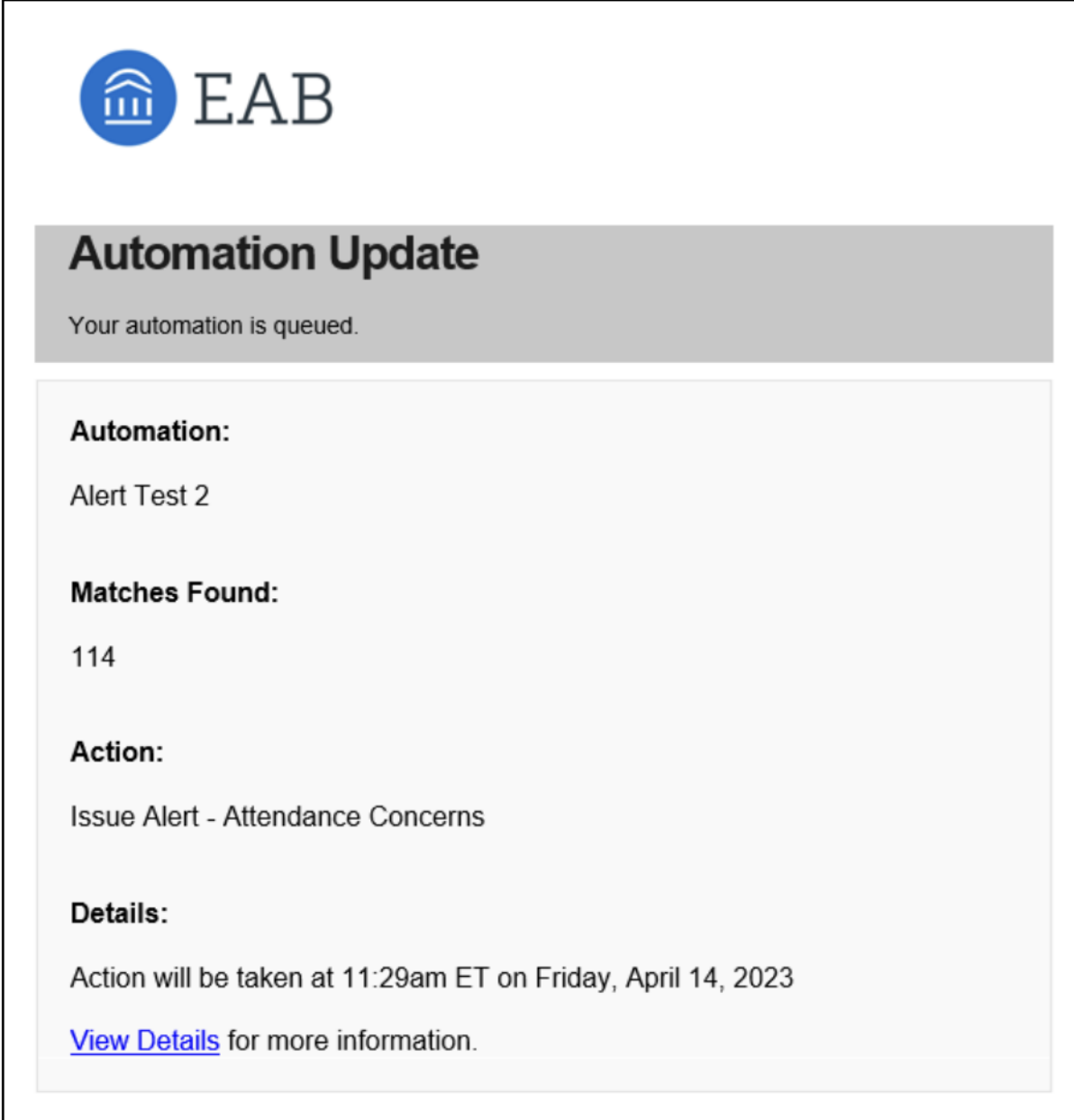
Cancelled At  
**N/A**

**Automation Information** 🔗 Support

Active Status



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



The screenshot shows an email notification from EAB. At the top left is the EAB logo, which consists of a blue circle containing a white building icon, followed by the letters "EAB" in a blue, sans-serif font. Below the logo is a grey header bar with the text "Automation Update" in bold black font. Underneath the header bar, the text "Your automation is queued." is displayed. The main body of the email is a light grey box containing the following information: "Automation:" followed by "Alert Test 2"; "Matches Found:" followed by "114"; "Action:" followed by "Issue Alert - Attendance Concerns"; and "Details:" followed by "Action will be taken at 11:29am ET on Friday, April 14, 2023". At the bottom of the details section, there is a blue hyperlink that says "View Details" followed by the text "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.

