

Navigate - Using Appointment Campaigns

Appointment campaigns send a personalized email to students with a link to click which will offer them appointment days/times as defined by the advisor initiating the campaign. This can be more directive than PAL links and can reserve time on an advisor's calendar for only particular meeting topics.

1. Create campaign availabilities before creating an appointment campaign:
 - See the *Create Availabilities* Navigate guide to edit or create a new availability. Create campaign availability in one of three ways:
 - Click *Edit* to the right of an existing availability to add campaigns to existing appointment availability. Under *What Type of Availability is This?* click *Campaigns*. NOTE: Campaign appointments and other appointments will be intermingled on the calendar.

Staff Home ▾

Students Appointments **My Availability** Appointment Queues Appointment Requests

Available Times

Actions ▾							
DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK	MEETING TYPE
Mon, Tue, -	9:00am	August 30, 2022 to September 28, 2022	'Exploratory / Undecided'	Major Exploration For: Appointments/Campaigns	UAC	Yes	In Person, Phone, Virtual
Wed, Thu, Fri	4:00pm						Edit

MODIFY AVAILABILITY ✕

What type of availability is this?

Appointments Drop-ins **Campaigns**

Meeting Type

In Person Phone Virtual

Care Unit

UAC

- Use the *Copy Time* feature in the *Actions* menu to create an availability that mirrors an existing availability. Under *What Type of Availability is This?* click *Campaigns*. NOTE: If the existing availability is not also altered, campaign appointments and other appointments will be intermingled on the calendar.

Available Times

Actions ▾

- Add Time
- Copy Time**
- Delete Time
- Add to Personal Link
- Remove from Personal Link

LOCATION	PURPOSE
'Exploratory / Undecided'	Major Exploration For: Appointments/Campaigns

MODIFY AVAILABILITY ✕

What type of availability is this?

Appointments Drop-ins **Campaigns**

Meeting Type

In Person Phone Virtual

Care Unit

UAC

- Create an availability from scratch using the *Create Availability* guide. Under *What Type of Availability is This?* click *Campaigns*. NOTE: If the existing availability is not also altered, campaign appointments and other appointments will be intermingled on the calendar.

Staff Home ▾

Students Appointments **My Availability** Appointment Queues Appointment Requests

Available Times

Actions ▾

- Add Time**
- Copy Time
- Delete Time
- Add to Personal Link
- Remove from Personal Link

LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK	MEETING TYPE
'Exploratory / Undecided'	Major Exploration For: Appointments/Campaigns	UAC	Yes	In Person, Phone, Virtual

MODIFY AVAILABILITY ✕

What type of availability is this?

Appointments Drop-ins **Campaigns**


Meeting Type

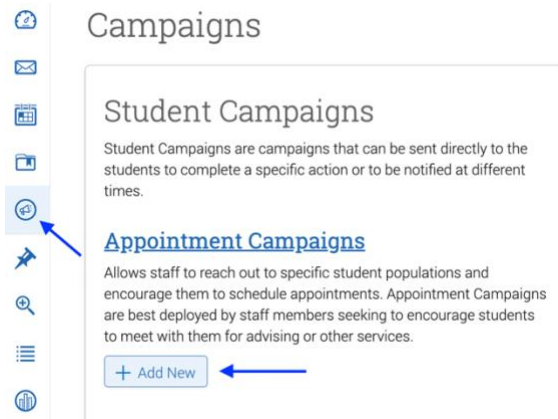
In Person Phone Virtual

Care Unit

UAC

2. To initiate a new appointment campaign:

- Click the Campaigns  icon from the navigation.
- Click **+ Add New** under the type of appointment campaign you would wish to create.



3. Define the appointment campaign parameters:

- Under *Campaign Configurations*, enter:

Campaign Name	<p><i>Include the goal of the campaign, the student population, and the semester in which the campaign will be launched.</i></p> <p><i>EXAMPLE: Fall 2022 Early Outreach Advisor Name First Last</i></p>
Instruction Notes for Landing Page	N/A
Care Unit	<i>Select the appropriate Care Unit from the available list.</i>
Location	<i>Select a major location for the Campaign</i>
Service	<p><i>Select an appropriate Service for the appointment campaign.</i></p> <p><i>EXAMPLE: 02 Plan Courses for Next Semester/Term</i></p>

- Under *Appointment Configurations*, enter:

Appointment Limit	<i>The maximum number of appointments a student can make for this service at this location by clicking the campaign link. EXAMPLE: 2</i>
Appointment Length	<i>The length of time which will be scheduled when a student makes an appointment through the campaign link. EXAMPLE: 30 minutes</i>
Slots Per Time & Reminders	<i>For one-on-one advising sessions, select 1. For group advising sessions, select the number of students who may attend each appointment. NOTE: Make sure to select the type of automated reminders you would like to send out.</i>

- Under *Scheduling Window*, enter:

Start Date	<i>Select the start date to allow meetings for this location/service. EXAMPLE: Monday, August 29th, 2022</i>
End Date	<i>Select the end date to allow meetings for this location/service. EXAMPLE: Friday, September 9th, 2022</i>

- Click *Continue*.

4. Select recipients for (add students to) the campaign:

- To select all assigned students, scroll to the bottom of the page and click the checkbox for *My Students Only*. Then, click *Search* to pull in the list. Click the checkbox next to *Name* to select all people from your list.
- To select a subset of students, do one of three things:
 - Copy and paste a list of student E Numbers into the *Keywords (First Name, Last Name, E-mail, Student ID)* box (up to 100 E Numbers). E Numbers must only be separated by spaces (no commas or semicolons required). To copy and paste from an excel spreadsheet, select the cells containing E numbers in the spreadsheet, right click and copy, then right click and paste into the *Keywords (First Name, Last Name, E-mail, Student ID)* box.
 - Upload a student list (see the Upload a Student List guide) first. Under Student Information, click inside the *Student List (In Any of These)* box. Select the name of the appropriate list from the drop-down menu.
 - Input parameters under *Student Information, Enrollment History, Area of Study, Term Data, Performance Data, Course Data, Assigned To*, and/or *Success Indicators*.
- Click *Search*.
- Review the search parameters at the top of the returned result page. If needed, click *Modify Search* to add, remove, or edit search parameters.
- Review the returned student list. Select students by clicking the boxes next to individual students' names or by clicking the *ALL* checkbox at the top of the list. If the list contains more than 1000

students, click *1000 items on this page are selected. [Select all 1001 items](#)* to select all recipients in the list.

- Click [Continue](#).
- On the [Review Students In Campaign](#) page, double check the recipient list. To delete students, click the check box next to their name, click [Actions](#) at the top left of the list, and click [Remove Selected Users](#). To add more students to the campaign, click [Add More Students](#) at the bottom left of the page.
- Click [Continue](#).

5. Add organizers to the campaign:

- The [Add Staff](#) page will list all advisors who have created campaign availability for this location. Select the appropriate advisor(s) by clicking the checkbox next to their name.
- Click [Continue](#).

6. Compose an email message for the campaign:

- Under [Nudges](#), click [Add Nudge](#).
- On the new page that loads, under [Add Nudge](#) enter:
 - Subject: choose a catchy subject line for the email
 - Message: Remove or change the *Register Today* header. Edit the message to include additional information
 - Some merge tags will be auto-filled in the message. Use others as needed by copying and pasting the entire merge tag. Example: `{Student_last_name}`
 - Attachment: add attachment(s) as desired
 - Send Date: select the initial date for the email to be sent to students
- Under [Preview Email](#), review the email as it will appear to students. Edit for formatting in the [Add Nudge](#) pane as desired.

NOTE: If for use as an Enrollment Campaign, copy the text of the email in the Add Nudge box to be reused for additional nudges as desired.

If not for use as an Enrollment Campaign (ex: if using for outreach for graduation, satisfaction surveys, or other links) do not add additional nudges. Additional nudges will go to students who have not enrolled in the term defined in Step 2 (which may be all students even if they have clicked the link)
- Click [Save Nudge](#).
- If for use as an Enrollment Campaign, more nudges may be scheduled by clicking [Add Nudge](#). Continue to add as many nudge reminder emails on as many dates as benefits the campaign goals.
- OPTIONAL: Click [Add Success Message](#) only if using as an Enrollment Campaign. Success Messages are sent to students 24 hours after they have enrolled in the term defined in Step 2. If adding a Success Message, enter:
 - Subject: choose a catchy subject line for the email
 - Message: if desired, remove or change the *Thank you for Registering* header and the *You have now been registered for the {Term} term* sentence. Edit the message to include any additional information.
 - Some merge tags will be auto-filled in the message. Use others as needed by copying and pasting the entire merger tag into the message or subject line. Example: `{Student_last_name}`
 - Attachment: add attachment(s) as desired
- Click [Save Success Message](#).

7. Confirm and send the campaign email:

- Click the checkboxes to the right to send reminders to the organizer (advisor) and/or non-organizer (student) attendees.
- Review the defined campaign, composed message, and recipient list.
- To save and send later, click [Save and Exit](#).
- To send the email to the selected student list, click [Send](#).

Fall 2022 Enrollment Academic Major Appointments

Confirm & Send

Care Unit: Advising	Start Date: 02/07/2022	End Date: 04/22/2022
Location: 'University Advisement Center (LS)'	Appt Length: 30 minutes	Slots Per Time: 1
Service: 02 Plan Courses for Next Semester/Term	Appt Limit: 1	Organizer Attendee Reminders: <input type="checkbox"/> E-mail <input type="checkbox"/> SMS
		Non Organizer Attendee Reminders: <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> SMS

Subject (\$student_first_name), Make an Appointment for Fall Registration Advising

Email Preview [View](#) **Invitees:** [View All \(1747\)](#) **Included organizers** [View All \(1\)](#)

[< Back](#) [Save and Exit](#) [Send](#)