

Creating an Appointment Campaign

Navigating to Campaigns: While on the advisor home screen, select "Appointment Campaigns" from the left hand side Quick Links section. This will take you to the Campaigns tab. From there, select Appointment Campaign from the right hand side, under Actions.

Define Campaign:

- o Name your campaign (Students will not see the name of the campaign)
- o Select "Advising" as the Campaign Type
- o Select 1 slot per time
- o Under "Select Course or Reason", choose the services for which you are available. **NOTE:** This must match the availability you have set up on your advisor home page, under "My Availability". In that screen, you must have selected matching appointment reasons. For example, if in your advising campaign you say you will be available for "Registration", you must also have chosen "Registration" as a service you are available for in your campaign appointment availability.
- o Begin Date and End Date- choose the date range for which you want the campaign to run. If a student tries to schedule outside of that time period, they will receive a message stating that the campaign has expired. **NOTE:** This must match the availability you have set up on your advisor home page, under "My Availability". Ensure that you have created CAMPAIGN availability (as opposed to appointment or drop in availability) during the timeframe that you would like your campaign to run.
- o Appointment Length- how long do you want the appointment to last?
- o Appointment Limit- how many appointments can the student schedule for the campaign? (default is 1)
- o Location- Choose your location. **NOTE:** Ensure that for the campaign availability you have created under "My Availability" you have selected that you will be available in the same location (Advisor's office).

Adding Students: Use the advanced search feature to search for students you would like to participate in the campaign. Or, choose one of your saved searches by clicking the drop down arrow beside "Saved Searches". If you want to ensure that you only return a list of students assigned to you, also click the box beside "My Students Only" next to the Search button. Select the students you wish to include in your campaign. Confirm the list of students included and remove or add students as needed.

Review Students In Campaign

Actions ▼	
<input type="checkbox"/>	NAME
<input type="checkbox"/>	Ellert, Channah
<input type="checkbox"/>	Malis, Philbert
<input type="checkbox"/>	Plaas, Claire
<input type="checkbox"/>	Tourtlotte, Zohartze

Adding Staff: If you have correctly set up your availability for Campaigns then you should see your name on the next page under "Add Advisors to Campaign". If applicable, select other advisors to join your campaign.

Compose Your Message:

- Create a Subject Line for your email
- In the next box, edit the text for the email. Default is "Please schedule your advising appointment". **NOTE:** Always be sure to keep the Schedule Link in your email body, if that is removed students will be unable to schedule appointments.
- In the instructions and notes box, add any details about the appointment that you would like to display on the scheduling landing page. For example, "This is a registration appointment to ensure you register for Fall 2016 classes. Please bring a list of courses you are interested in."
- As you edit these fields, the text in the box below will show how your edits will appear in the message.
- Scroll down to the bottom of the screen. On the left tab, you will see a snapshot of what the email the student receives will look like.
- On the right tab, you will see the scheduling landing page. This is where the student will be directed to choose a time for their appointment when they click the link in their email.

Confirm & Send: Review the details of your campaign. When you are ready, click send to issue the email to students on the list.