How-To: Creating Appointment Campaigns

Appointment Campaigns enable advisors to request that specific students select a specific date and time in which to schedule an appointment. This feature is commonly used when an advisor must meet with all their students at least once per term or wants to schedule mandatory appointments with a special student cohort.

1. Click Appointment Campaigns in the Actions or Quick Links menu. Under “Actions” click, “Appointment Campaign”

2. Define your appointment campaign by filling out the required fields. **NOTE:** You must select a reason that is associated with your location for your location to show as an option.
3. Add students to your campaign. If you created a campaign directly from a Watch List or Saved Search, you will be asked to review your students. If not, the Advanced Search screen will open.
   a. Using Advanced Search to Create a Campaign
      i. You have several ways to search for and select your students.
         1. Invite All My Assigned Students: Adds all students assigned to you to the campaign.
         2. Advanced Search: Use the Advanced Search filters to find and select students. After starting the search, you will be presented with a list of students. Select the students you wish to add and then choose Add Selected Users and Search for More from the actions menu.

   NOTE: You can remove students from the campaign if needed. For example, if you met with one of the students already and don't need them to come in during the campaign period, they can be removed.

4. Add advisors to the campaign.
   a. You will need to select yourself as the advisor for the campaign. You may also have the option to select additional advisors to make them available for appointments based on the campaign. NOTE: if other staff are going to be included on the campaign, the reason/location/date range must align with Campaign/Appointment Availability for the advisor(s) that are going to be included in the campaign.
   b. By default, this screen shows advisors who have specific campaign availability. To view all advisors with general appointment availability, check “include appointment availabilities”

5. Compose your message. This is what a student will receive from you. You can also add instructions or notes that a student will see when scheduling the appointment. NOTE: Do not remove the schedule link from the email body.

6. Confirm and send! 😊