

Launching an Appointment Campaign

To begin, open the **Campaigns** page and select **Add New** from the Appointment Campaigns section.

Appointment Campaigns

Allows staff reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

+ Add New

Define the Campaign

The **New Invitation Campaign** page opens. Now you set the criteria for the Appointment Campaign. The fields that must be filled out are listed and defined below.

New Appointment Campaign

[Define Campaign](#) — [Select Recipients](#) — [Select Staff](#) — [Compose Nudges](#) — [Verify and Start](#)

Define Campaign

Set up your campaign. Specify your appointment details and timing.

Campaign Configurations

* Campaign Name: Instructions or Notes for Landing Page:

* Care Unit: * Location:

* Service:

Appointment Configurations

* Appointment Limit: * Appointment Length:


* Slots Per Time:

Staff Reminders: Email Text Recipient Reminders: Email Text

Scheduling Window

Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

* Start Date: * End Date:



Timeline

- Objective: Pending Setup...
- Recipients: Pending Setup...
- Staff: Pending Setup...
- Welcome Message: Pending Setup...
- Campaign Ends: Pending Setup...

CancelSave and Exit [Continue](#)

Campaign Name

Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student. Make sure that you adhere to your institution's naming policy, otherwise other users will not be able to evaluate the impact of your campaigns.

Instructions of Notes for Landing Page

This field shows instructions for the campaign the student sees when they open the Appointment Campaign notification. Make this text short and descriptive.

Care Unit

The Care Unit the Appointment Campaign is associated with.

Location

The location where the appointments will be held.

Service

The Student Service associated with the campaign.

Course or Reason

The reason or associated course for the campaign here. This only appears if the Service is tied to a course.

Appointment Limit

How many appointments you want students to schedule during the campaign.

Appointment Length

How long the campaign appointment will be. Durations begin at a 5 minute length.

Slots per Time

Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment. The maximum number of slots is 500.

Allow Scheduling Over Courses

If checked, this box lets students schedule over course conflicts. *Course conflicts* refers to time slots where either the potential organizer or the student have conflicts due to either instructions or enrollments.

Staff Reminders

These checkboxes select what kinds of Appointment Campaign notifications the staff attached to the campaign will receive. The two options are Email and Text.

Recipient Reminders

These checkboxes select what kinds of Appointment Campaign notifications the campaign recipients (usually students) will receive. The two options are Email and Text.

Start and End Date

The date range that you want students make campaign appointments for.

Add Students to Campaign

After entering the details on the Define Campaign page, click **Continue**.

Your next step is adding students. If you created this campaign directly from a Student List or Saved Search, you are asked to review your students. If not, an Advanced Search opens.

The screenshot shows the 'Add Students To Campaign' interface. At the top, there is a header 'Add Students To Campaign' and a sub-header 'Advanced Search'. Below this is a 'Saved Searches' section with a text input field for 'Keywords (First Name, Last Name, E-mail, Student ID)'. The main section is 'Student Information', which includes several filter fields: 'First Name', 'Last Name', 'From Last Name', 'To Last Name', 'Student ID', 'Gender', 'Race', 'Watch List (In Any of These)', 'Transfer Student', 'Category (In Any of these)', and 'Tag (In Any of these)'. Below these are several expandable sections: 'Enrollment History', 'Area of Study', 'Performance Data', 'Term Data', 'Course Data', 'Assigned To', and 'Success Indicators'. At the bottom, there is a 'Search' button and two radio buttons: 'My Students Only' and 'Include Inactive'. Navigation buttons '< Back' and 'Continue >' are located at the bottom left and right respectively.

You have several ways to search for and select your students. You can add all students assigned to you to a campaign using the *Invite All My Assigned Students* option. The other option is an Advanced Search. Use Advanced Search filters to find and select students.

After starting the search, you are 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.

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.

Once finished, click **Continue** to move to the next page. You are asked to review the students in the campaign. If these are correct, click **Continue**.

Review Recipients in Campaign

Actions ▾

<input type="checkbox"/>	NAME
<input type="checkbox"/>	Aamot, Synnove
<input type="checkbox"/>	Aanderud, Perdy
<input type="checkbox"/>	Aanderud, Priti
<input type="checkbox"/>	Aanderud, Tevy
<input type="checkbox"/>	Aanderud, Venus

Timeline

- Objective: Schedule Appointment(s)**
By Fri 09/30/2022
- Recipients**
Pending Setup...
- Staff**
Pending Setup...
- Welcome Message**
Pending Setup...
- Campaign Ends**
Fri 09/30/2022

Add Staff to Campaign

Next, you need to choose Organizers for the campaign. You must select yourself. You can also select additional staff to make them available for appointments based on your role permissions.

Important. Staff must have availability defined before they can be added to an Appointment Campaign. If you do not see staff you expected to have availability, make sure their calendars and availability are up-to-date.



Appointment Campaign: Graduation Checklist

✓ Define Campaign — ✓ Verify Recipients — **Select Staff** — Compose Nudges — Verify and Start

Select Staff For Campaign

Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	Mariano Bogan	For: Appointments Tue-Thu 8:00am - 5:00pm ET
<input type="checkbox"/>	Jeromy O'Conner	For: Appointments/Drop-Ins/Campaigns Mon-Fri 9:00am - 6:00pm ET
<input type="checkbox"/>	Will Purdy	For: Appointments/Drop-Ins Mon, Wed 12:45pm - 5:15pm ET
<input type="checkbox"/>	Kailey Bernhard	For: Appointments Tue-Thu 8:00am - 5:00pm ET

TIMELINE

- Objective: Schedule Appointment(s)**
By Mon 03/28/2022
- Recipients**
4
- Staff**
Pending Setup...
- Nudge 1**
Pending Setup...
- Campaign Ends**
Mon 03/28/2022

[< Back](#) [Save and Exit](#) [Continue >](#)

Add Welcome Message, Nudges and Success Message

Note. Welcome messages are the first nudge sent to students.

Nudges replace the Compose a Message functionality and allows for more communication from your school to students during an Appointment Campaign. Each nudge is an email sent to your campaign list. You can customize the message sent to the student; however, the link and link text will always be the URL and text set in the first step of the Appointment Campaign.

Nudge emails are sent the morning of the date chosen when you create the nudge. Welcome messages send immediately after starting the appointment campaign. As with any email, some may be slightly delayed.

To create a nudge, define your campaign and create your list of students for the Appointment Campaign. The Nudges page opens.

Email Campaign: Welcome to Fall Term

Define Campaign — Verify Recipients — **Compose Nudges** — Confirm & Send

Compose Nudges

Nudges
Add a nudge to send to the students you have selected on specific dates. You can have as many nudges as you would like.
[+ Add Welcome Message](#)
There are currently no nudges

Timeline
Name: Welcome to Fall Term
Recipients: 19
Welcome Message: Pending Setup...

[Back](#) [Save and Exit](#) [Continue](#)

Click **Add Welcome Message** to create your first nudge. When composing the Welcome Message nudge, the compose message page shows **Save Welcome Message** instead of **Save Nudge** at the bottom

Thank you!
President Natasha

Available Merge Tags

{student_first_name}	Inserts the student's first name
{student_last_name}	Inserts the student's last name
{tracking_hyperlink}	Inserts the tracking link for this campaign

Add Attachment:
[Choose File](#) No file chosen

* Send Date
Wednesday, August 24, 2022

Previous Nudge Dates:
N/A
Current Nudge Dates:
N/A

We're excited to see you at welcome events for your first week at Rock Creek. There are activities for any interests that you have, including the Activity Fair, our introductory assembly at Big Stadium, and even more. Join us for all the fun!
[Click here to see the schedule of events](#)

Thank you!
President Natasha

Any Additional Questions?
Please contact your assigned Advising Center for additional information regarding this email.

NAVIGATE

[Cancel](#) [Save Welcome Message](#)

You must create at least one nudge per campaign; however, you can create more. There are no limits on how many nudges you can send.

The screenshot displays the 'Appointment Campaign: Graduation Checklist' interface. At the top, there is a navigation bar with steps: 'Define Campaign', 'Verify Recipients', 'Select Staff', 'Compose Nudges' (highlighted), and 'Verify and Start'. The main area is split into two panels: 'Add Nudge' on the left and 'Preview Email' on the right.

Add Nudge Panel:

- Subject:** A text box containing the placeholder text: `{Student_first_name}, Schedule an Advising appointment`.
- Message:** A rich text editor with a toolbar (Bold, Italic, Bulleted List, Numbered List, Link, Merge Tags, Undo, Redo). The message content is:
Please Schedule Your Advising Appointment.
Hello `{student_first_name}`:
Please schedule an appointment for Mandatory Advising at Central Advising Building. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.
`{schedule_link}`
Thank you!
- Available Merge Tags:** A table listing available tags:

<code>{student_first_name}</code>	Inserts the student's first name
<code>{student_last_name}</code>	Inserts the student's last name
<code>{schedule_link}</code>	Inserts a link to schedule the appointment
- Add Attachment:** A section with a 'Choose File' button and the text 'No file chosen'.
- Send Date:** A dropdown menu showing 'Monday, March 14th 2022'.

Preview Email Panel:

- Subject:** **Andrew, Schedule An Advising Appointment**
- Image:** A cartoon character of a blue building with a face and arms, representing the university.
- Message:** The preview of the email content:
Please Schedule Your Advising Appointment.
Hello Andrew:
Please schedule an appointment for Mandatory Advising at Central Advising Building. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.
[Schedule an Appointment](#)
Thank you!
- Additional Information:** A section titled 'Any Additional Questions?' with the text: 'Please contact your assigned Advising Center for additional information regarding this email.'
- Logo:** The 'NAVIGATE' logo with a blue building icon.

At the bottom right of the interface, there are 'Cancel' and 'Save Nudge >' buttons.

Enter a subject line and customize the message. The available Merge Tags are listed under the *Message* text box. You can see a preview of the message in a panel right of the composition panel. You can also attach a file to this message.

Fields used in the message composition are:

Email Subject

The subject of the nudge email going to the student. It is Schedule an Appointment by default.

Message

The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.

Send Date

The date the email nudge is sent.

After creating a nudge, click **Save Nudge** to continue. You may continue creating nudges after this.

You can also create a Success Message on the Nudges step of an Appointment Campaign. This is an email sent the day after the recipient schedules all appointments for the campaign. It is for communication purposes only. Click **Add Success Message** to start creating a Success Message.

The screenshot displays the 'Appointment Campaign: Graduation Checklist' interface. At the top right is a blue cartoon character logo. Below the title is a progress bar with steps: Define Campaign, Verify Recipients, Select Staff, Compose Nudges, and Verify and Start (the current step). The main area is split into two panels: 'Add Success Message' on the left and 'Preview Email' on the right.

Add Success Message Panel:

- Subject:** Thank You For Scheduling Your Appointment
- Message:** A rich text editor with the text: "Hi {\$student_first_name}, Thank you for scheduling your appointment. Thank you!"
- Available Merge Tags:**
 - {student_first_name} Inserts the student's first name
 - {student_last_name} Inserts the student's last name
- Add Attachment:** A file upload button labeled "Choose File" with the text "No file chosen".

Preview Email Panel:

- Title:** Thank You For Scheduling Your Appointment
- Image:** The blue cartoon character logo.
- Text:** "Hi Andrew, Thank you for scheduling your appointment. Thank you!"
- Text:** "Any Additional Questions? Please contact your assigned Advising Center for additional information regarding this email."
- Logo:** The NAVIGATE logo.

At the bottom right of the interface are two buttons: "Cancel" and "Save Success Message" with a right-pointing arrow.

The **Add Success Message** page is like the Add Nudge page; however, there is no Send Date because the Success Message only sends after the student schedules an appointment. You may also use merge tags when writing your Success Message.

After you have finished composing your message, it's time to send out your campaign!

Verify and Start

Review your campaign details, nudges, invitees, and advisors on this page.

Click **Start Campaign** when you are ready to email the invites to the selected students.

Verify & Start

Campaign Summary

Define Campaign	Name: Test Day Choices Care Unit: WL Advising Location: WL Center for Success Service: Major Advising Appointment Limit: 1 Appointment Length: 30 mins Slots Per Time: 1 Scheduling Window: 09/06/2022 - 09/20/2022 Staff Reminders: Email - Yes Text - Yes Recipient Reminders: Email - Yes Text - Yes
Recipients	View 2 recipients
Staff	View 1 staff
Welcome Message	Send Date: Tue 09/06/2022 Subject: {\$student_first_name}, Schedule a WL Advising appointment Email Preview: View Email
Scheduled Nudge	Send Date: Fri 09/09/2022 Subject: {\$student_first_name}, don't forget to schedule! Email Preview: View Email
Success Message	Subject: Thank You For Scheduling Your Appointment Email Preview: View Email

[< Back](#)

Save and Exit [Start Campaign](#)