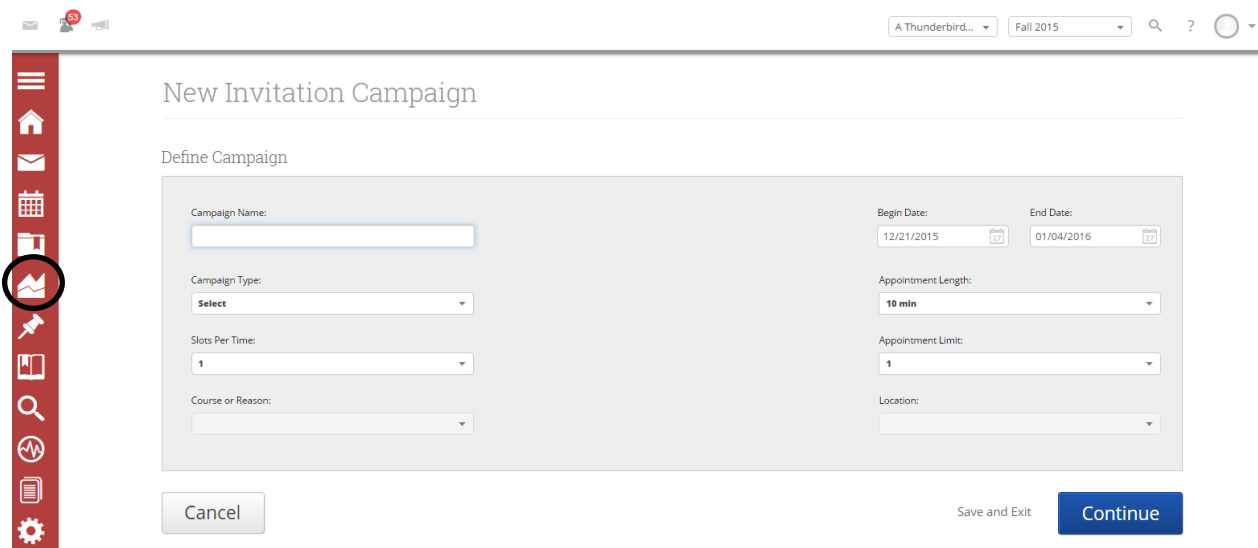# Appointment Campaigns

Getting Started

Appointment Campaigns enable the advisor to request that specific students select a specific date and time in which to schedule an appointment instead of the advisor creating appointments for each and every student. This feature is commonly used when an advisor must meet with all of their students at least once per term.

To begin, click on **Campaigns** tab then under Actions, click on the Appointment Campaigns link and follow the setup steps.

New Invitation Campaign

- *Enter the Campaign Name.* This needs to be a name that makes sense to you regarding the type of campaign you are about to send.
- Campaign Type. Choose Advising Appointments
- Slots Per Time. This is the number of slots per time slot in your campaign i.e. I can see 2 students for the afternoon time slot at 1 pm.
- Course or Reason. Select the course or reason for the type of campaign you are creating. (not a required field)
- Begin date and End date. This will be the date range for which you want the students to schedule their appointments.
- Appointment Length. This is where you define exactly how long the appointment will be.
- Appointment Limit. This is how many appointments you wish for each student to schedule.   Students can use the link multiple times to schedule appointments if you set this to a value higher than one.
- Location. Select the location of where the appointments will be held.

Add Students to Campaign

Once the Campaign Details are created and the selections are defined, the next step is adding students to the campaign.

Use the Advanced Search options to narrow down your assigned students or any other criteria that you wish.

Once you select the students from the advanced search that are assigned to you, their names will appear in a list.

To remove a recipient from the list, just simply select the checkbox next to their name and click the Actions dropdown. Then, click Remove Selected Users. Once the list is complete you may proceed by clicking Continue.

Add Advisors/Tutors To Campaign

Next we need to select the Advisors that will be part of the campaign. You can select your name by selecting the checkbox next to your name and clicking Continue. **Note**: Advisors or Tutors

have the ability to designate availability times just for campaigns. They can set these by navigating to their profile and selecting the My Availability Tab.

For convenience, a selection box is located in the top right of the screen that allows the creator of the campaign to also Include Appointment Availabilities. This is helpful if you want to show all the available times for scheduling and not just the times for campaigns.

Now we need to add a Subject for the campaign.

Email Subject. The topic will be the subject of the email going to the student.
Instructions or Notes. This will be your message to the student.

An email preview will show at the bottom of the page. Once you are finished, click Continue.

Please make sure that you review your selected options before you send the campaign. Once you click the **Send** button, emails will be sent to all your selected students.

Campaign Name

Confirm & Send

Campaign Type: Advising	**Start Date:** 12/21/2015	**End Date:** 01/04/2016
Reason: Advising	**Appt Length:** 10 minutes	**Slots Per Time:** 1
Appt Location: Advising II	**Appt Limit:** 1	**Reminders:** ☑ **E-mail** ☑ **SMS**

Subject Campaign		
Email Preview View	**Invitees:** View All (7)	**Included Advisors** View All (1)

< Back   Save and Exit   **Send**

Managing Your Campaign

This next section gives you several tools to help manage your Appointment Campaign after you create and send it.

Appointment Campaigns > Meet with me for Career Counseling
03/27/2014 - 04/11/2014

Appointments Made	Appointments Not Yet Made	Reports Created

💬 Send a Message   📄 Add Note   🏷 Add Tag

☐ ALL		APPT DATE	APPT TIME	STUDENT	AT-RISK?	APPT CREATED ON	
☐	1	03/28/2014	9:00a-9:30a	Battle, Bryan	No	03/27/2014	View Details

Appointments Made

This tab will let you see which students have made appointments. Not only can you view those students, but you can also **Send a Message, Add Note,** and/or **Add Tag** for those students.

Appointments Not Yet Made

This tab will display those students who have not yet made their appointment(s).

Appointment Campaigns > Meet with me for Career Counseling
03/27/2014 - 04/11/2014

ALL		STUDENT	EMAIL	TOKEN
☐	1	Bell, Kevin	bell@gradesfirst.com	66cIMHDm5t
☐	2	Belue, David	belue@gradesfirst.com	pW3RhmFUGl
☐	3	Black, Charlie	black@gradesfirst.com	5GiVkoqcyY
☐	4	Collins, Lloyd	collins@gradesfirst.com	lshFLuarsn

- *Resend Appointment Request.* This option will let you resend the appointment campaign email to selected students. This is great, for instance, if a student accidentally deletes the original email.

Reports Created

This tab will display all advisor reports that were created for the appointments made during this campaign.

Appointment Campaigns > Meet with me for Career Counseling
03/27/2014 - 04/11/2014

ALL		DATE	STUDENT NAME	COMMENT	FOLLOW-UP?		
☐	1	03/27/2014	Collins, Lloyd	Meet with Lloyd to discuss his career goals and strategies.	No	Details	Delete

Appointment Campaign Options

Options

- Edit Campaign Details
- Add/Remove Recipients
- Delete This Campaign

- *Edit Campaign Details.* With this option, you can edit anything about the appointment campaign. When those changes have been saved, they will automatically apply to all students who still are required to make an appointment. Students who have already created their appointment(s) will not be affected by the changes.

- *Add/Remove Recipients*. This option will allow the advisor to either add or remove students for this campaign.
- *Delete This Campaign.* You can use this option to delete an existing campaign. However, deleting this campaign will NOT remove any student appointments that have already been scheduled.