How to Create an Appointment Campaign

1. Select the Campaigns from the left side Quick Links sections.

2. Then select Appointment Campaign from the right hand side under Actions.

3. Define the campaign. When finished, Click Continue.

Name your campaign using the Naming Convention.

Add your Care Unit.

Add your Location.

Add your Service.

Set your Begin Date. This is the first day that you want to meet with students during the campaign.

Set your End Date. This is the last day you want to meet with student during the campaign.

Appointment Limit is the number of times you want the link in your invitation to work. Most often, once.

Appointment Length is how long want the appointment to last. Range from 5 to 90 minutes.

Slots Per Time is how many students are in the appointment. Default is one for a 1 on 1 appointment but you can raise the number for group appointments.

To allow students to schedule over their courses, select the box.
4. Add students to the Campaign.

Add Students To Campaign

If you have students assigned to you in Pathways you can just send the campaign to your assigned students.

Otherwise you would select Advance Search to search for your students.

Once you have selected your list, select all of the students you want to add and click Actions to select Add Selected Users and Search for More. This is true even if you have no additional students to select.

You will see a yellow line across the bottom of the screen telling you how many students have been added. Then click the blue Continue button.

5. Review the students in the campaign. To remove any students, click on the box next to the student and select Actions and Remove Selected Users

6. You will need to add organizers to your Campaign. Click on the box next to your name. Then click next.

If you don’t see your name, Save and Exit. You can go back to your Availability tab to match your Services or add Campaign appointments to your availability. You can return to your campaign and pick up where you left off.

7. Now you can compose your message. This is the email you will send out to students with the link to make an appointment with you. Make sure that the {$schedule_link} tag stays intact. This is how a student can make an appointment with you.

Compose Your Message

Please schedule your Advising appointment.

Hello ({$student_first_name}): While there is populated text here, you can change as little or as much as you need. ({$schedule_link})
Thank you!

Please schedule your Advising appointment.
8. Confirm your appointment campaign. Any changes can be made before the emails are sent out to students. The Campaign can be sent a couple of days ahead of when you want students to make an appointment with you. The first time students will see for appointments is the Begin Date.

<table>
<thead>
<tr>
<th>Care Unit</th>
<th>Advising</th>
<th>Start Date: 09/22/2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Virtual Appointment: School of Engineering</td>
<td>End Date: 10/06/2020</td>
</tr>
<tr>
<td>Service</td>
<td>ENGR - Summer Scheduling Appointment</td>
<td>Slots Per Time: 1</td>
</tr>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Subject</td>
<td>(Student_first_name), Schedule an Advising appointment</td>
<td>Organizer Attendance Reminders: Email, SMS</td>
</tr>
<tr>
<td>Email Preview</td>
<td>View</td>
<td>Invites: View All (17)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Included organizers: View All (1)</td>
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